



Collaborative Audience Development Plan for the North West: Research Report

Commissioned by Derry City and Strabane District Council and Donegal County Council

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Table of Contents

Introduction	4
How this Research Report came about	4
How it links to the Audience Development Plan	4
Section 1: Research Methodology	6
Cultural engagement baseline methodology	8
Sampling.....	8
Quota targets.....	10
Quality control	10
Technology and data protection.....	10
What the baseline can and can't tell you	11
Section 2: Research results and insights.....	12
Overall cultural engagement in the North West	13
Cultural engagement within each council area	14
Breaking down engagement	14
Donegal County Council.....	15
Derry City and Strabane District Council	15
What does this section tell us?	15
Cultural engagement by activity	16
Engagement Behaviour.....	18
Cultural engagement and frequency	19
Where do NW residents go to participate and attend culture?.....	20
Who do they go with when engaging with culture?.....	21
What do they do in their spare time?.....	22
Section 3: Research story.....	24
What does all this data tell us about cultural engagement across the NW and how does that inform the Audience Development Plan?	25
Family Basics	27
Suburban Stability	27
Municipal Tenants.....	28
Distant Views	29
Local Families	29
Country Choice.....	30
Practical Pensioners	30
What factors have the largest impact on cultural engagement?	32

Age	32
Presence of children	39
What other factors have an impact on cultural engagement?	43
Disability.....	43
Social grade.....	44
Gender	45

Introduction

The Cultural departments of Derry City & Strabane District Council (DCSDC) and Donegal County Council (DCC) came together to commission an audience development baseline survey and programme across the North West to understand and increase the engagement of citizens in the area in arts, culture and heritage.

The need for a strategic audience development project had been articulated in both the Strategic Investment Plan and the Arts & Culture Strategy from DCSDC as well as in the Donegal County Council Creative Ireland *Culture & Creativity Strategy*. 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.

The research delivered allowed for better understanding of how citizens engage with that offer, which would then allow informed decision making about where effort should be directed to increase engagement.

A plan, co designed with the sector would address the target audiences identified, with consistent monitoring and reporting to assess the impact of any actions.

The opportunity to deliver this ambitious and strategic audience development work was tendered, with thrive securing the contract in early 2019 with work beginning immediately.

How this Research Report came about

Although there was not a requirement in tender to provide a Research Report, the richness and usefulness of that data and insight derived from the project has proven to be a catalyst for much discussion and development across and within each council. In a meeting with DCSDC and DCC in October 2020 it was agreed that both Councils would receive the data (in an excel spreadsheet format) and a stand-alone research report would be written.

This was to ensure that:

- The full value of the research could be recognised across the Councils and at NW Regional Development Board level
- The insights would continue to be used long after the formal NW Audience Development Project has finished
- The raw data was available for continued reference across both Councils

How it links to the Audience Development Plan

The research report is a standalone document and along with the raw data tables provided to each council offers an ongoing and highly valuable data resource that neither council has had before.

The Audience Development plan has been informed by the research so for anyone wanting to understand the origins of and rationale behind the audience development plan, will find that content and confirm that, as all good audience development plans should be, the NW Audience Development Plan has audiences at its core.

Section 1: Research Methodology



The original tender methodology was adapted as part of the project development process but did not change significantly from the tender proposal.

The methodology and the rationale for each stage can be summarised as:

Chosen methodology	Rationale
Desk (secondary) research looking at: <ul style="list-style-type: none"> • Case studies of successful collaborative audience development projects • Insights from other audience development project previously delivered by thrive • Insights from other research work whether curated or created by thrive that was relevant to this project 	More efficient use of resources if previous work can give some of the answers and/or inform some of the primary research to be carried out.
Primary Research Baseline of cultural engagement using face-to-face surveying of 2,400 residents across the North West.	Ability to develop research that would answer some of the two Councils' specific questions and form a baseline that could measure impact of audience development activity. In addition this would fill the gaps in audience insight highlighted in both Councils' relevant Cultural Strategies and plans.
Partners' box office and/or audience data gathered through surveys etc.	Useful to see what already existed within cultural organisations to get understanding of the gaps in data collection that had already been flagged in previous work. The gaps found were significant so creating a framework for consistent and collatable data in the future was a vital part of the Audience Development Project process and plan.
Experian data through MOSAIC profiling	Gives a bigger picture of the types of people who live in the Council areas and that understanding can inform what types of people could be targeted through audience development.

The baseline was the most ambitious part of this work and had never been done in either of these council areas. A significant piece of primary research, it has the potential to provide a gold mine of insight for each Council, the cultural partners in each council area and other stakeholders.

It is worth looking at the methodology used for the baseline to fully understand its value. It is also important to outline what the baseline results can and cannot tell those using it. No piece of research can ever be fully comprehensive so there are always limits to what can be uncovered. But the NW Baseline was the most comprehensive study of cultural engagement ever undertaken by these two councils and across NI previously, has only ever been undertaken by Belfast City Council.

Cultural engagement baseline methodology

There are two key elements:

- The survey
- The fieldwork

Thrive worked with members of the DCSDC and DCC Culture, arts and heritage teams to develop the survey questions and flow. This took several weeks with the Belfast City Council (BCC) survey being used as an initial starting point.

However, the NW survey was significantly expanded to ensure it met the needs of the NW Audience Development Project. The final NW survey dug into barriers and behaviours around cultural engagement and considered locations and different cultural forms. The opportunity to research motivations and behaviours would make this baseline research even more valuable for the immediate use in creating the Audience Development plan but also could inform longer term cultural activity and investment.

The rationale and draft survey were also shared with the 32 cultural partners in the project although the final decisions of the survey content rested with DCSDC and DCC as advised by thrive. The final survey can be found in Appendix 1.

The fieldwork was overseen by thrive and the delivery was sub-contracted to Cognisense. Cognisense have been working in market research across Ireland since 1965. Their work has helped inform some of the most important decisions in public policy, societal change, commerce and industry for public and private sector clients, first trading as Ulster Marketing Surveys, and later Kantar Millward Brown Ulster.

Cognisense offer a skilled team of highly experienced qualitative and quantitative researchers, plus Northern Ireland's largest panel of face-to-face and telephone interviewers. The fieldwork was carried out across July-September 2019. People were surveyed face-to-face in their homes by Cognisense's trained fieldworkers.

This survey was to be conducted at a population level i.e. the sample of people spoken to in the survey would represent the make-up of the overall DCSDC and DCC local authority populations. This make-up was informed by the statistics provided by the NI Statistics and Research Agency (NISRA) and the Central Statistics Office for Ireland (CSO).

Sampling

The sample is the number of people across the whole population that need to be surveyed to say that the results are representative of the whole population.

- In DCSDC that was 1,400 adults
- In DCC that was 1,000 adults

There are different types of sampling methods:

- **Simple random sampling**, which treats all people equal. This works if everyone has a likely chance of being selected to take the survey. However, that is unlikely to happen in most areas as some people will be more likely to be selected than others. It was decided not to use random sampling for this baseline.
- **Stratified random sample**, which draws up a plan representative of the population using estimates from the CSO for Donegal and NISRA for DCSDC. This methodology is industry standard and was selected for the baseline.

In Donegal, the sample was divided into the 5 Municipal Districts:

- Donegal
- Glenties
- Inishowen
- Letterkenny
- Stranorlar

Each of these 5 areas was then further sub-divided into sampling points for the sampling plan¹.

In Derry and Strabane, the sample was divided into 7 District Electoral Areas:

- Ballyarnet
- Derg
- Faughan
- Foyle side
- Sperrin
- The Moor
- Waterside

Each of these 7 areas was then further sub-divided into sampling points for the sampling plan.

The two-stage stratified random sampling method involves firstly a regional segmentation based on electoral geographies, and secondly, an urban / rural classification based on population density.

This was designed to ensure that each council area could be looked at in greater detail as it was anticipated that those living in more urban areas of each council area could have different ways of engagement with culture than those in more rural areas. Each council has a diversity across its citizens and its geography, and we wanted to make sure that any differences identified would be statistically robust.

¹ Specific sampling points have been supplied to DCC on request

Quota targets

The population data from the CSO and NISRA creates the quotas by age, gender, and socio-economic group. These quotas are used both at the smaller sample area level, and at the larger electoral district level. Having these quotas helps to ensure that each sampling area and electoral district has a similar makeup to the population.

These quotas are key as everything is controlled through quota targets i.e. the fieldwork is monitored as it is carried out to make sure that quotas are being met and no one type of person or characteristic is being over represented.

In summary the quotas are the key to the robustness of the research as they:

1. Ensure enough people from the rural areas are surveyed within both the sample area and the electoral district
2. Ensure the overall number of people surveyed in DCC and DCSDC is representative of the population within both the electoral districts and the sample area.

Quality control

Data collection throughout is subject to ongoing checking via supervisory accompaniment of interviewers to sense check veracity in accordance with the requirements of the Interviewer Quality Control Scheme (IQCS) and Market Research Society (MRS) ethical code of conduct.

The data is also rigorously monitored for quality assurance, and is subject to a minimum of 10% “back-checking” amongst respondents to validate details of their interview i.e. people are contacted again to check that what was recorded for their responses was correct.

Various other electronic logic checks and verifications are also deployed via the data collection software to ensure maximum accuracy in the recording of responses.

On a weekly basis, thrive received updates as to how many of each quota had been achieved and if there were any problems with meeting any of the quotas this was flagged and a plan put in place to address if required.

Technology and data protection

The data is collected electronically via bespoke survey software and administered on handheld interview terminals. With handheld administered personal interviewing the survey results are recorded on the handheld computer and synchronised to the back-end systems.

The software utilises 4G technology, enabling data to be uploaded instantly once an interview has been completed meaning that top line findings can be accessed at any stage during fieldwork. All synced data is secured on database servers installed behind layered firewall architecture. Data is never stored on a public network. Data protection is enshrined by membership of the Market Research Society (MRS). The fieldwork company is the Data Controller in accordance with the Data Protection Act 1998.

All data is processed by the fieldwork company through a range of NIPO processing tools and ultimately an SPSS datafile was given to thrive.

What the baseline can and can't tell you

Yes it's in there	No it's not covered here
<p>What activities did North West residents participate in? This helps to get an idea of levels of participation and how they can differ across cultural form and demographics</p>	<p>Exact details of each activity across the 12-month period</p>
<p>What activities did North West residents attend or visit? This helps to get an idea of levels of attendance and how they can differ across cultural form and demographics</p>	<p>Exact details of each activity across the 12-month period</p>
<p>Where did the engagement happen, and who with? This helps us to see if people are going to the known cultural venues, sites and spaces and/or engaging in culture in other types of spaces in their areas including what level of cultural activity is done at home</p>	<p>Specific venues or spaces are not asked about</p>
<p>What prevents them from engaging? This helps us understand how cultural opportunities are being limited for some people and potentially why that is happening. If we understand that we can start to look at solutions that place people's needs first.</p>	<p>People were not asked for their suggestions as to how these barriers could be overcome as a survey doesn't really allow for that deeper type of discussion.</p>
<p>What other things do they do in their spare time? No-one only does cultural engagement. It is useful to see what else people are doing to understand people's availability and also what needs are being served by these different activities and where does/could cultural engagement fit in.</p>	<p>We can get an understanding of how people spend their spare time we don't get into the specifics as people won't remember</p>

Section 2: Research results and insights



Throughout this report, we will look at North West residents' **overall cultural engagement** but also:

- **Cultural forms** they engaged with the most (and the least);
- Engagement **behaviour**: frequency of engagement, the most visited types of venues, who people prefer to experience culture with and what they do in their spare time;
- The impact of **disability, age, social grade** and **gender** on cultural engagement.

This report will provide valuable insights about North West residents' cultural lives to inform current and future cultural planning at council level and development of partnerships with and between cultural partners.

Definition of engagement:

Engagement is defined as participation and/or attendance in the cultural activities listed in the baseline survey. Section 3 from page 24 further explores the variety of cultural activities used in the baseline survey.

Overall cultural engagement in the North West

To determine North West residents' overall cultural engagement, we asked participants a series of questions about their levels of attendance and participation, but also about where they visited, who they went with and cultural engagement's barriers they often came across.

The results were extremely encouraging. We found that:

- **98%** of North West residents have engaged in arts, culture or heritage in the past year.
 - **98%** of DCC residents have engaged in arts, culture or heritage in the past year.
 - **99%** of DCSDC residents have engaged in arts, culture or heritage in the past year.
- **92% of North West residents participated in** a cultural activity and **94% attended** a cultural event or visited a cultural venue or museum. These figures are slightly higher than in previous research we conducted on Belfast residents².
- 19% of North West residents say they haven't engaged in culture in the past year but that figure drops to 2% when we looked at all the actual activities they participated in or attended identified in the survey.

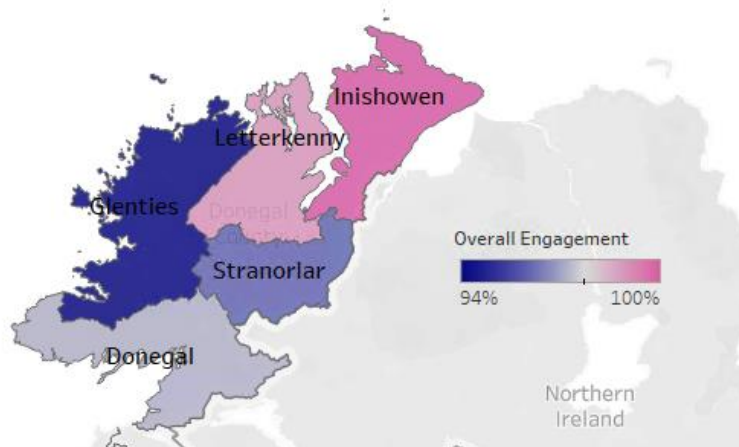
This suggests that people are engaging in arts, culture or heritage **without** considering it as a cultural activity.

² Belfast was 94%, however the list of items included in the Belfast definition of culture was not identical to the North West Baseline survey

Cultural engagement within each council area

We were also interested in the spread of cultural engagement across the North West region. We looked at data cut by municipal/electoral areas in both Donegal and Derry City & Strabane to see if there were any differences in engagement levels.

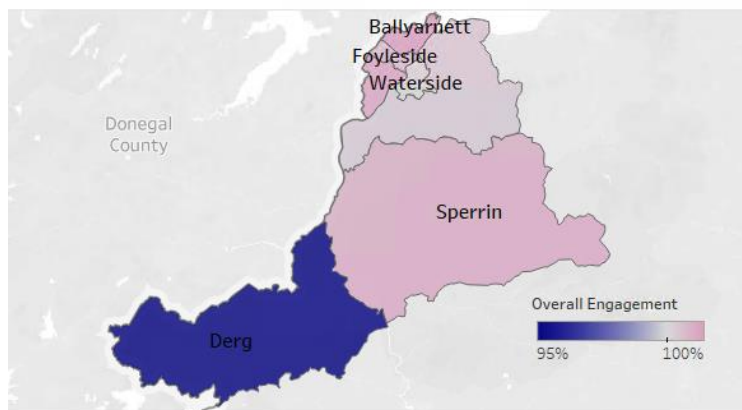
Cultural engagement in Donegal County Council across 5 municipal areas:



Area	Overall Engagement
INISHOWEN	100%
STRANORLAR	96%
LETTERKENNY	99%
GLENTIES	94%
DONEGAL	97%

Inishowen and Letterkenny show the highest levels of engagement, however engagement is high across all 5 electoral districts.

Cultural engagement in Derry City and Strabane District Council across 7 electoral areas:



Area	Overall Engagement
BALLYARNETT	100%
DERG	95%
FAUGHAN	99%
FOYLESIDE	99%
SPERRIN	99%
THE MOOR	100%
WATERSIDE	99%

There was very little difference in the 7 electoral areas across DCSDC with Derg slightly lower than the other areas.

There were some areas that had lower levels of engagement than others. However, even those areas with lower engagement still score highly. These areas are not performing badly, just not as well as others across the North West.

Breaking down engagement

We can also separate out attendance and participation levels in each geographic area to see if there are differences or trends.

Donegal County Council

Inishowen and Letterkenny were consistently high in attendance and participation.

Participation and attendance across each of the 5 municipal areas in DCC

Area	Overall Attendance	Overall Participation	Overall Engagement
INISHOWEN	97%	96%	100%
STRANORLAR	87%	90%	96%
LETTERKENNY	98%	97%	99%
GLENTIES	84%	76%	94%
DONEGAL	92%	89%	97%

Derry City and Strabane District Council

Here we saw greater differences between attendance and participation.

Attendance was highest in Sperrin, Faughan and the Moore, and participation was highest in Foyle side and the Moor.

Participation and attendance across each of the 7 electoral areas in DCSDC

Area	Overall Attendance	Overall Participation	Overall Engagement
BALLYARNETT	95%	94%	100%
DERG	92%	86%	95%
FAUGHAN	97%	87%	99%
FOYLESIDE	92%	98%	99%
SPERRIN	98%	94%	99%
THE MOOR	97%	96%	100%
WATERSIDE	94%	94%	99%

What does this section tell us?

- Engagement is high.
- Attendance and participation is high.
- There are some variations across each council in the levels of attendance and participation, but no area performs poorly.

Cultural engagement by activity

The next analysis of the data looked at engagement via cultural form. It is often assumed that certain cultural forms are more accessible than others, so this section explores the data to test those assumptions.

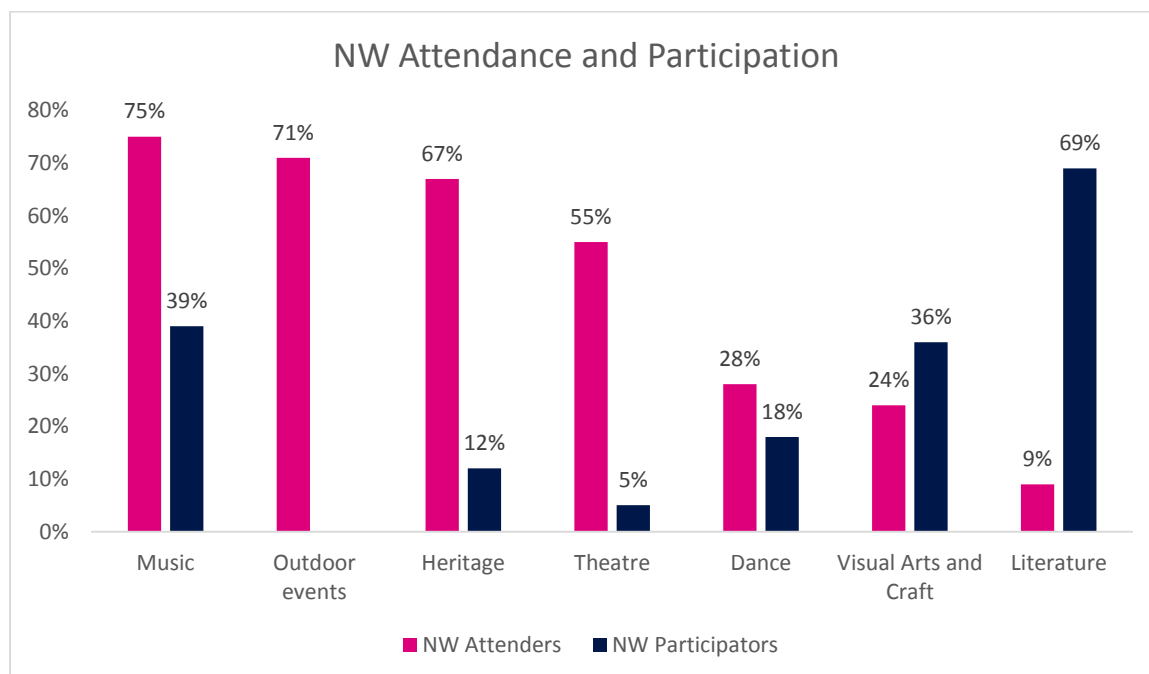
Cultural forms with the highest levels of overall engagement (including participation and/or attendance) across the North West include:

- 80% of residents engaged with music
- 78% engaged with literature
- 71% of residents engaged with outdoor events
- 69% engaged with heritage
- 56% engaged with theatre

Over half of residents in the North West reported engaging in those art forms.

Most cultural forms had higher levels of attendance than participation. That is, in general, people are more likely to **visit** a venue than to take part in a cultural activity. This is not unusual. Engagement research shows that people attend more than participate. Attendance is a passive activity in the main, whereas participation is more active and arguably requires more commitment.

We see below that some cultural forms lend themselves more to participation, some more to attendance and some a mix of both:



This data confirms commonly held assumptions:

Music



- Music is the highest art form for attendance, and this is not a surprise given the huge wealth of music events across the region from major concerts to small pubs and community venues.
- Music also has the second highest level of participation across the art forms. This is driven by playing an instrument either in your own home or attending a class, being part of a band/music group and signing. It is clear that music is a part of everyday life for many people in the North West.

Outdoor events



- Given the nature and scale of outdoor events, it is not surprising that attendance is higher here than participation. Given the many festivals e.g. Halloween and Earagail Arts Festival, across the NW it is not a surprise that this registers as the second highest attended.

Heritage



- Again, here we see that levels of attendance outweigh participation. Previous work by thrive looking at the visitor break down to NI Museums, found that families formed a significant section of those attending.
- Participation activity is increasingly being offered by the heritage organisations including the Playful Museums initiative and workshops to look at family genealogy. There is an opportunity to develop participation in heritage, for the right audiences.

Theatre



- People were more likely to say they attend theatre rather than participate. This makes sense although the amateur dramatic sector is strong in the North West and so we know participation occurs through those structures and in other ways through standalone workshops etc. But in the main, theatre is much more attendance based as a cultural form.

Dance



- Dance is the only art form to have an even split between attendance and participation. This can be explained by the fact that dance is seen both as an art form and as a form of exercise. For example, classes in belly-dancing or ball room dancing are promoted using health benefits. We have seen in other research however, that there is limited crossover between the two, that is if someone attends dance performances that does not make them a target to also participate in dance.

Visual arts and craft



- We see greater participation levels over attendance in visual arts and crafts. Previous research undertaken by thrive and others indicates that visual arts has work to do in increasing attendance across the population. Specific visual arts spaces are often seen as intimidating although visual art in other spaces like libraries and community centres plus public art is viewed very positively as contributing to a sense of place. Within craft, taking part is the key driver in this art form – to learn a new skill, develop existing skills and increase social interaction. Craft is a cultural form that is accessible and often enjoyed at home.

Literature



- Participation far exceeds attendance in this art form. This could be driven by the fact that reading for pleasure and reading to a child were included within the survey, as well as undertaking creative writing at home or/and as part of a class. Arguably the perception, and the reality, is there are more easily accessible ways to participate in literature than there are to attend.

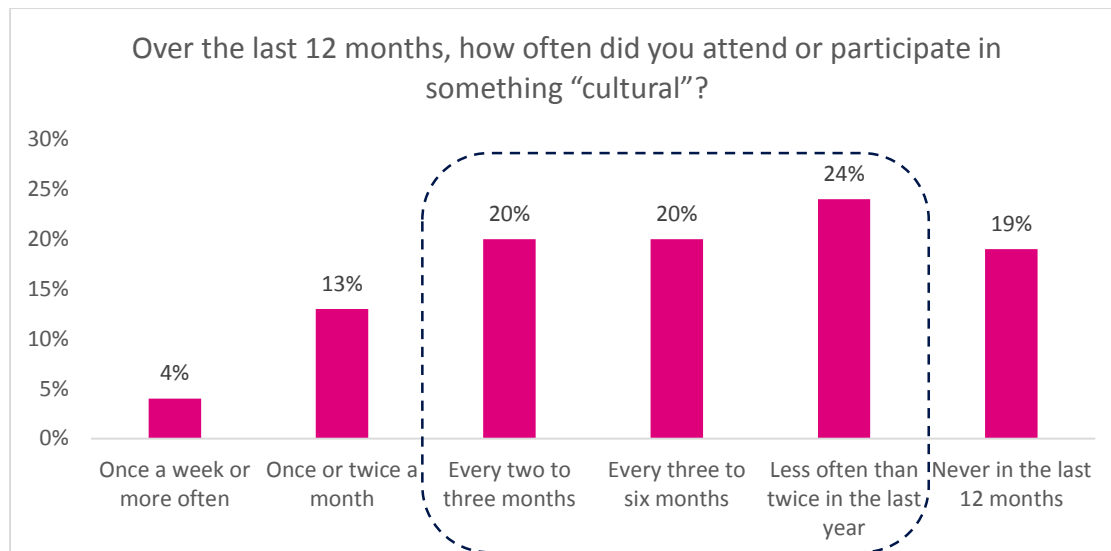
Engagement Behaviour

So far in this report we've looked at **what** cultural activity people do across the NW.

This next section looks at what the research tells us about their **behaviour** around culture and what else they do in their spare time. This data helps to understand the role culture plays in the lives of NW residents and what else is competing for their time and money.

Cultural engagement and frequency

We asked survey participants about their cultural engagement frequency over the last 12 months:



Our results echo research into engagement both nationally and internationally, which shows that engagement for the majority is not regular:

- Most North West residents say they engage in culture **less than once a month**.
- **45%** of them perceive themselves as **occasionally** engaged in culture.
- **19%** say they have not engaged in the last 12 months.

This research defined cultural activity broadly and asked about activity within formal cultural structures and outside of those structures as well. If we had limited the research to attendance at cultural venues – theatres, concert venues etc we would have found that engagement is even less frequent. Thrive’s ³Foundations Benchmark in 2018-19 showed that:

- Most audiences are only attending once a year.
- 77% of customers attended only once during the financial year 2018-19.
- Approximately two-thirds of customers (68%) did not return the following year.

Gaining and maintaining loyalty is a huge challenge in the cultural sector so setting realistic targets around engagement needs to take this in account.

³ Foundations benchmark report is produced annually by thrive across 16+ organisations. It looks at key metrics including loyalty and differences between regional and Belfast venues and festivals.

Where do NW residents go to participate and attend culture?

The baseline wanted to see if residents were going to dedicated arts and culture venues, often funded or run by local councils, or if they were getting their cultural fix elsewhere or if it was a combination of many different types of places. It is important to understand the breath of different places people use to give them access to the cultural activity they want.

The research shows that:

- People living in the NW like to **participate and attend in many different spaces**.
- High levels of **participation** were commonly found at **home or at community centres**.
- **60% of residents attended entertainment venues** such as pubs, coffee shops or clubs for culture.
- 55% attended **public spaces and community centres**.
- 37% of residents **attended something cultural at a dedicated arts and culture space**.
- 28% attended a cultural event **in a hotel**.
- **26% of residents crossed the border** to attend or participate in culture in the last year.⁴
- Residents of Derry and Strabane were a little more likely to cross the border compared to Donegal residents (30% vs. 23%, respectively).

	Where they participate	Where they attend
In your own home	67%	N/A
A community venue (school, church, town parish hall, community centre)	43%	41%
Entertainment venue (arenas, pubs/clubs, coffee shop, comedy clubs)	27%	60%
Public space (on street, playing fields, parks, beaches)	15%	55%
Dedicated arts and culture space (arts centre, concert hall, theatre)	15%	37%
Another private space (someone's house, location not open to general public)	14%	11%
Hotel	12%	28%
Sports facility (GAA club, leisure centre)	8%	13%
Heritage site (castle, ruin, archaeological site, national park, nature reserve)	6%	8%
Museum, heritage centre or historic house	6%	9%
Public library	6%	7%
Art gallery or artist's studio	4%	7%
Temporary space (Circus tent)	1%	6%

This range of spaces used indicates that people will find the cultural experience that most fits their needs and go to whatever place offers that in a way that best suits them.

It also supports other research which says that people can find dedicated arts and cultural spaces off putting for a number of reasons, but that doesn't mean they won't or don't engage with culture in other spaces.

Who do they go with when engaging with culture?

Across the NW:

- 51% went with their **friends**
- 51% went with **spouse/partner**

The research showed some different patterns in the 2 areas.

In Derry & Strabane,

- 37% said they went with other family members (besides children and a spouse/partner).
- 21% with their children under 16.

We often picture families as parents and children, but it also includes grandparents, siblings, cousins or older children no longer living at home.

In Donegal,

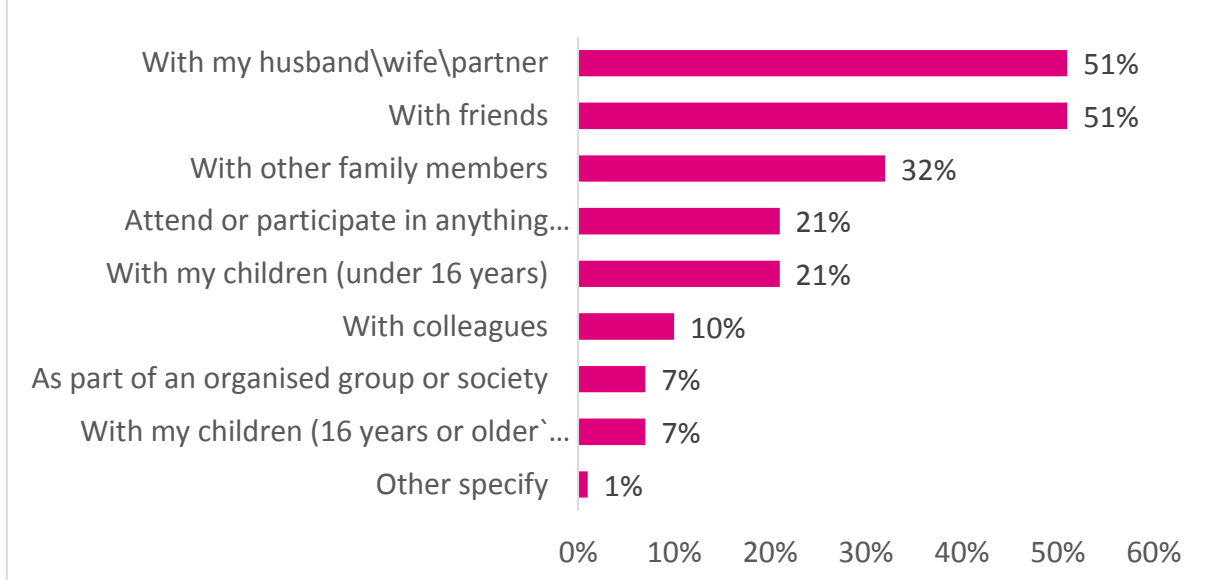
- 25% go to cultural events on their own
- 22% go with work colleagues or as part of a society or organised group.

While we have highlighted the key differences, clearly people in DCC also engage in culture as a family group and those in DCSDC also attend on their own as shown below:

	DCSDC	DCC
With husband/wife/partner	50%	52%
With friends	51%	52%
With other family members	37%	27%
Attend or participate in anything on my own	17%	25%
With my children under 16 years	21%	22%
With colleagues	7%	14%
As part of a group or society	5%	9%
With my children (16 years or older)	7%	7%
Other (specify)	1%	0%

During the last 12 months, who else attended or participated in something “cultural” with you?

Total North West



Across the categories, people attending with their family (in one form or another) and comes up a lot. There was also a higher tendency in DCC than in DCSDC to attend with colleagues.

What do they do in their spare time?

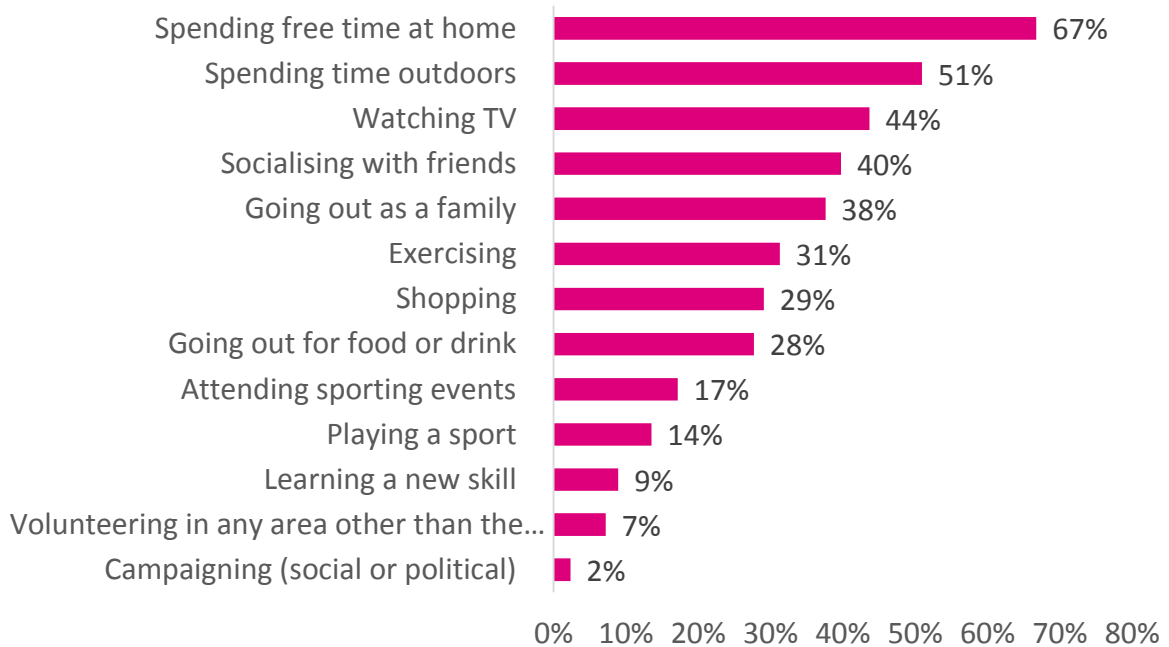
When creating programmes to attract or develop relationships, we need to focus on how culture can fit into people’s lives. We compete for their time: not necessarily with other cultural providers, but with other demands in their lives. So we wanted to understand more about how NW residents choose to spend their free time.

The results are not surprising. Two-thirds of NW residents spend a lot of their free time at home. DCC residents were more likely to spend time at home, outdoors, exercising or going out for food/drink. For DSCDC, going out as a family was strong again.

We asked people what they do in their spare time:

Total North West

(% of residents who do these activities a lot)



	DCSDC	DCC
Spending free time at home	61%	72%
Spending time outdoors	48%	53%
Watching TV	45%	42%
Socialising with friends	41%	38%
Going out as a family	45%	30%
Exercising	29%	34%
Shopping	30%	28%
Going out for food or drink	26%	30%
Attending sporting events	16%	19%
Playing a sport	13%	14%
Learning a new skill	8%	10%
Volunteering in any area other than the arts	7%	8%
Campaigning (social or political)	2%	2%

Section 3: Research story



What does all this data tell us about cultural engagement across the NW and how does that inform the Audience Development Plan?

- Overall lots of people of different ages and backgrounds take part in cultural activity across all of the North West.
- This is both attending and participating and across arts, heritage and culture.
- People are finding things to attend and engage in in all parts of the North West.
- People are using both the formal cultural facilities on offer for these activities but many more are using other types of facilities and/or engaging at home.

It could be argued that simply continuing with this status quo is sufficient.

However, the data also shows us some areas for potential development

Sustainability – the arts, heritage and cultural sector needs to increase its sustainability. The keyway to do that is to be relevant to people’s lives and meet their needs. The only way to do that is to understand their lives, the role of culture, and their needs and co-create arts, heritage and cultural activity that fits those lives and meets those needs. This needs to happen both within and without formal cultural spaces while also acknowledging that those spaces receive significant investment and perform important civic and tourist functions across the region.

Families and the role of culture in family life was a thread throughout the research. There were clues that families might be a productive target audience as we saw that people often engage in culture as a family group. Other indicators around a family target audience included previous thrive reach and studies from elsewhere that show families are a ‘hungry’ audience – in that they are always looking for good things to do that are fun and beneficial. Covid has affected families in terms of missing out on intergenerational contact and social interaction for children as schools and other activity has been limited. In discussions with the Cultural Partners many had started activity for families and were keen to grow this. Families also cover many of the groups who were underrepresented in the data including those from lower socio-economic groups and those in more rural locations.

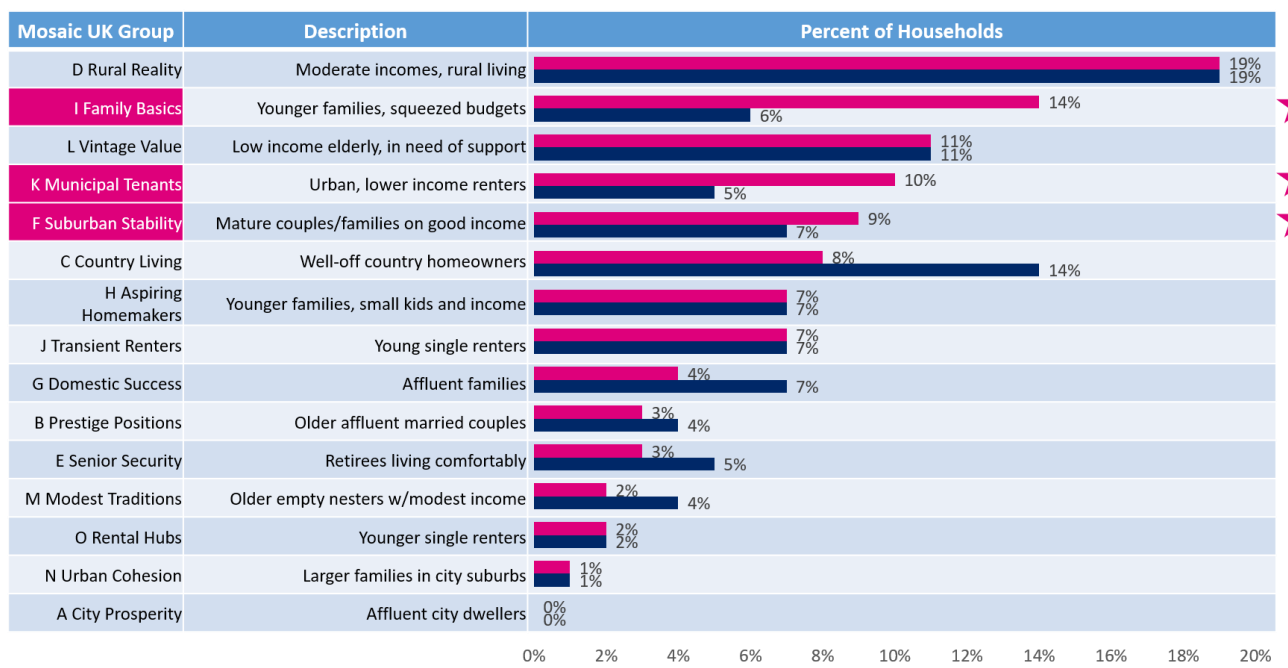
To look at this a bit more, we used Experian’s segmentation of household residents in both Ireland and the UK, called Mosaic. Mosaic capitalises on Experian’s access to a wealth of information on all individuals in the UK and Ireland and the neighbourhoods in which they reside. This includes the following:

- Household structure
- Lifestage
- Property and tenure information
- Economic indicators
- Census data

The Mosaic segmentation gave us geographic insights into the different areas, enabling us to look at the overall make-up of the population in DCSDC and in DCC. We could see what types of people lived in each council area and which types had higher numbers than others.

From the data below, families were the most dominant group across both Council areas. This included different types of families including those who we saw in the NW Data as being underrepresented. The sheer size of the families group in the populations of both DCSDC and DCC meant we had a large viable audience to target. A mainstream rather than niche audience, that would reach significant numbers of people and create significant levels of impact on those families' lives making best use of resource across arts, heritage and culture.

Comparison of Mosaic groups:
Derry and Strabane vs. total NI



★ = more found in Derry and Strabane than NI
 ■ % of Derry/Strabane households ■ % of NI households Source: Experian UK

When we look closer at the 3 segments that are overrepresented in the DCSDC area we can learn more about their lives. 2 of the 3 segments prevalent in the area are families, with a mixture of both younger and older children.

Family Basics

(I) Family Basics

- 14% of households in Derry and Strabane
- 6% of households in Northern Ireland

Who are they? Family Basics are families with children who have limited budgets and can struggle to make ends meet. Their homes are low cost and are often found in areas with fewer employment options.



Key Features

- Families with children
- Aged 25 to 40
- Limited resources
- Some own low cost homes
- Some rent from social landlords
- Squeezed budgets

Digging Deeper

- 88% have children in the household
- More likely to have children under 11 years
- 65% earn less than £30k per year
- Majority find it difficult/very difficult to live off their income

Suburban Stability

(F) Suburban Stability

- 9% of households in Derry and Strabane
- 7% of households in Northern Ireland

Who are they? Suburban Stability are typically mature couples or families, some enjoying recent empty-nest status and others with older children still at home. They live in mid-range family homes in traditional suburbs where they have been settled for many years.



Key Features

- Older families
- Some adult children at home
- Suburban mid-range homes
- 3 bedrooms
- Have lived at same address some years
- Research on Internet

Digging Deeper

- 66% are between the ages of 46-65
- 51% earn between £30-49k per year and are comfortable on their household income
- 42% are older families with no children <18
- 20% are older families with children <18

Municipal Tenants

(K) Municipal Tenants

- 10% of households in Derry and Strabane
- 5% of households in Northern Ireland

Who are they? Municipal Tenants are long-term social renters living in low-value multi-storey flats in urban locations, or small terraces on outlying estates. These are challenged neighbourhoods with limited employment options and correspondingly low household incomes.



Key Features

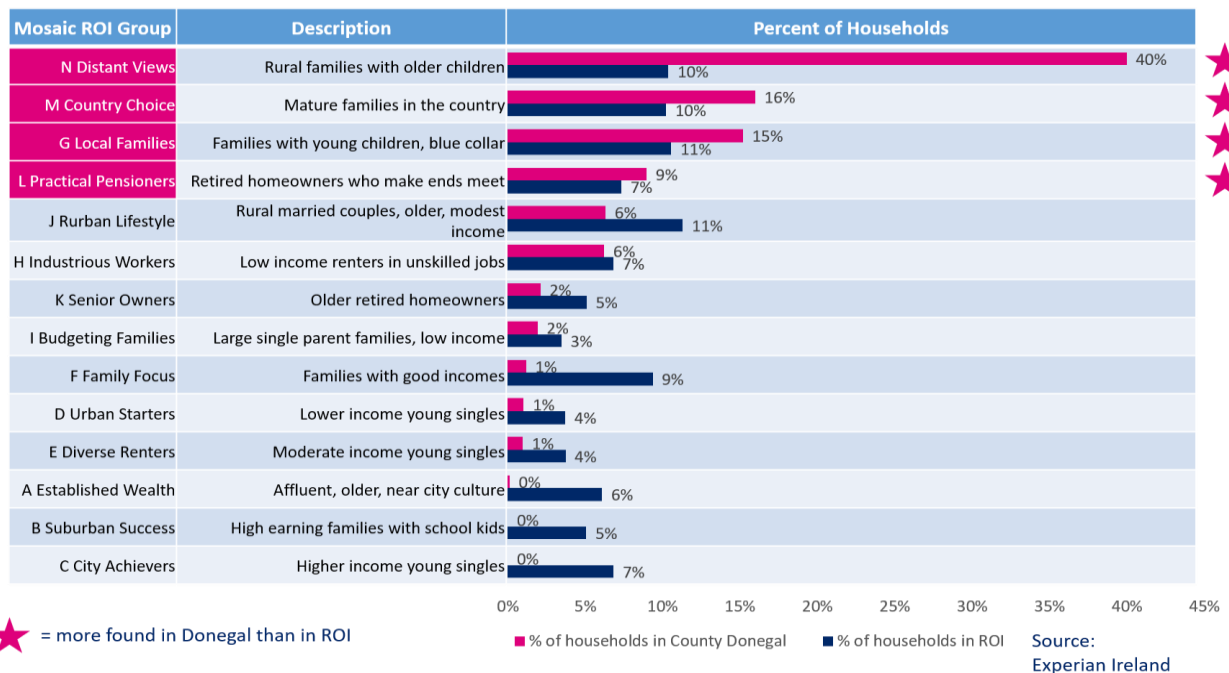
- Social renters
- Low cost housing
- Challenged neighbourhoods
- Few employment options
- Low income
- Mobile phones

Digging Deeper

- Over half (57%) earn less than £20k per year
- 47% find it difficult/very difficult to live off their income
- More likely to be aged 46-65
- 82% live in council or HA housing

The profile of Donegal looks different, with a significant overrepresentation of 1 segment.

Comparison of Mosaic groups:
Donegal vs. total ROI



Distant Views

This segment represents 40% of the households in Donegal, compared to 10% of households across the Republic of Ireland.



Although not as dominant as the Distant View segment, there are 3 other segments that are more prevalent in Donegal than elsewhere in the Republic of Ireland.

Local Families



Country Choice



Practical Pensioners



Families therefore make up a considerable percentage of households in Donegal and are an obvious target for any audience development work.

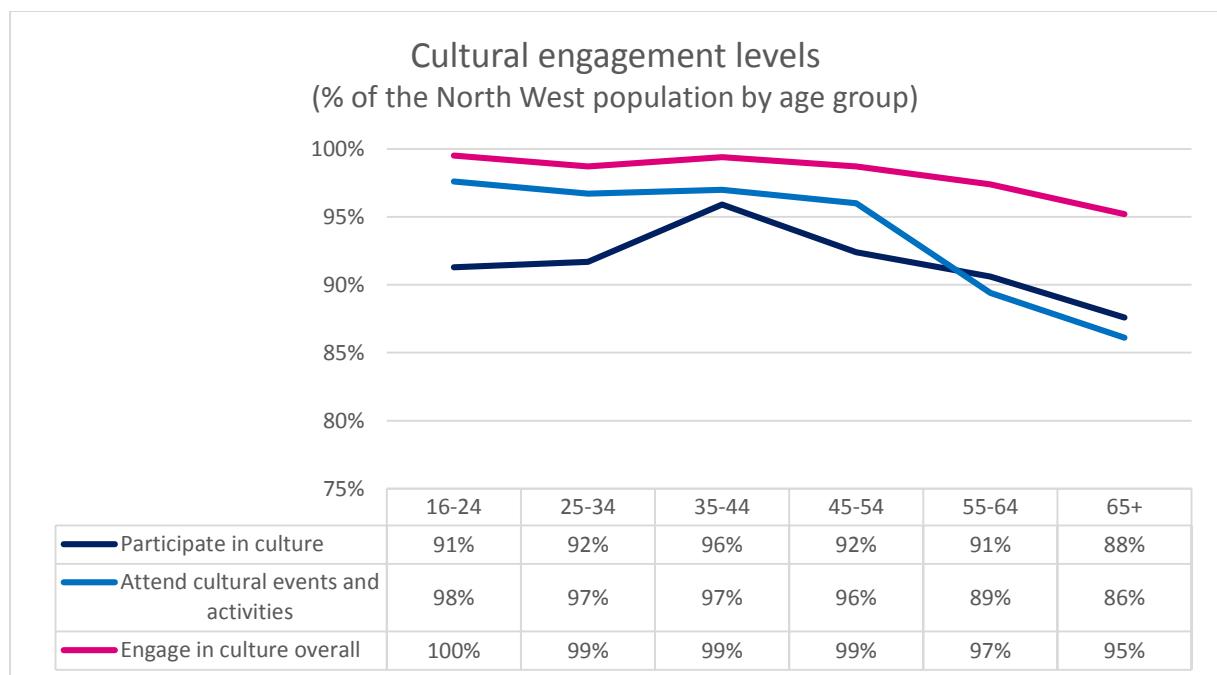
Taking the NW Data and the Mosaic data alongside other studies and the information from the Cultural Partners lead to the conclusion that the second target audience should be families. This audience offered scale and huge return on cultural resource investment through a targeted Audience Development Plan.

What factors have the largest impact on cultural engagement?

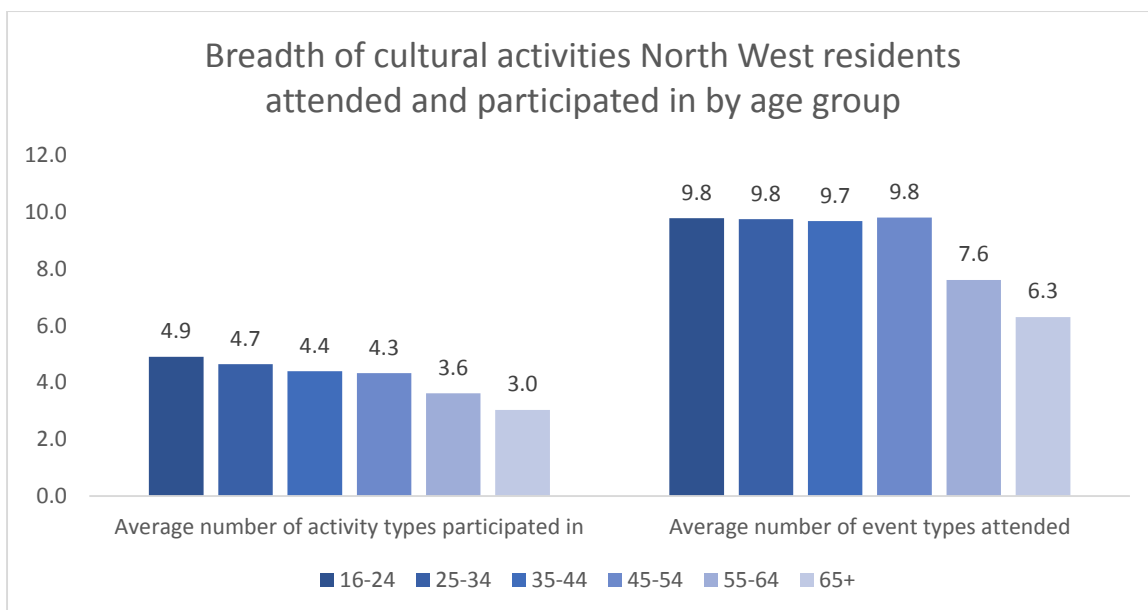
We looked at the data to see what demographic factors influenced cultural engagement and behaviours and found that age and presence of children in the household had the largest impact.

Age

We found that younger age groups were more likely to attend, participate, and engage in culture. The percent of people engaging in cultural activities starts to decrease from the age of 45-54.



The same is true for the breadth of activities people engage in – people were more likely to engage in a wider variety of cultural activities from the age of 16-54, with the average number of activity types decreasing among those aged 55+.



Young people aged 16-24 were more likely to participate in a wide variety of activities - they were over-represented in 21 categories and only scored low in 2 (reading to children and textile crafts). It is very similar to what we found in the Thrive Belfast Baseline, with a lot of crossover between the two.

As we know from the data above, older age groups (aged 55+) were less likely to attend, participate, and engage in culture. 55-64 year olds were only over-represented in 1 category and under-represented in 13. Finally, the 65+ age group performed above the average in textile crafts, but under in 21 activities.

Cultural activities North West residents participated in (by age group)

■ Overrepresented compared to the total average
 ■ Underrepresented compared to the total average

	16-24	25-34	35-44	45-54	55-64	65+
Read newspapers or magazines in hard copy or online	79%	80%	83%	82%	84%	84%
Read books or ebooks	68%	71%	76%	69%	66%	56%
Read out loud to children	32%	57%	63%	46%	40%	26%
Sang alone	37%	33%	29%	32%	24%	21%
Sang in a group with others	25%	21%	22%	21%	14%	13%
Danced (including tea dances and ceilidhs)	19%	18%	17%	22%	16%	16%
Painting, drawing, printmaking or sculpture	26%	23%	16%	13%	13%	8%
Read out loud to adults	22%	24%	17%	18%	11%	7%
Played a musical instrument	32%	18%	14%	15%	11%	8%
Textile crafts (sewing, quilting, knitting, felting, crocheting)	7%	11%	11%	19%	17%	24%
Photography (not selfies, family or holiday snaps)	14%	18%	13%	12%	8%	7%
Public speaking (prepared speeches, debating competitions)	19%	12%	12%	12%	8%	4%
Volunteering or campaigning to support arts, culture or heritage	11%	7%	8%	12%	7%	7%

Wood crafts (turning, carving, furniture making)	9%	7%	7%	8%	6%	6%
Participated in a history or genealogy project or group	8%	7%	6%	6%	8%	7%
Participated in a heritage or conservation project or group	6%	6%	6%	9%	7%	7%
Other crafts such as model-making, ceramics or jewellery making	7%	7%	7%	9%	3%	3%
Engaged in traditional building skills (thatching, dry stone wall construction)	8%	8%	5%	4%	6%	5%
Participated in a book club group	5%	6%	6%	3%	7%	4%
Recited Poetry, Folklore or storytelling (not bedtime story telling)	8%	5%	5%	4%	4%	4%
Written stories, poetry or comics	8%	4%	3%	5%	4%	4%
Performed in a Marching Band or Carnival Parade	8%	7%	4%	3%	1%	3%
Written songs or composed music	8%	6%	3%	4%	2%	1%
Made films or videos (not family or holiday)	7%	4%	4%	4%	3%	1%
Acted in a play or drama	9%	5%	3%	3%	3%	0%
Acted or sang in musical theatre	4%	3%	4%	3%	1%	1%
Created a game, digital animation or built a world within a game (e.g. minecraft)	7%	3%		1%	2%	0%
Performed stand up or sketch comedy	2%	2%	2%	2%	0%	1%
Written plays	2%	1%	0%	1%	1%	0%
Performed circus, clowning or mime	1%	1%	1%	2%	0%	0%
Acted or sang in an opera	1%	2%	1%	1%	0%	0%

Cultural attendance also varies by age, with younger age groups (16-24) over-represented attending 10 of the event types listed, and older age groups (65+) under-represented in over half of the event types listed. Younger people (16-34) were more likely to attend outdoor events, see street performers, go to a rock or pop concert, and go to a techno/electronic music performance. People aged 35-44 were more likely to attend a pantomime, circus event, or ballet performance. Older people aged 55-64 were only over-represented in one activity – attending a classical music performance.

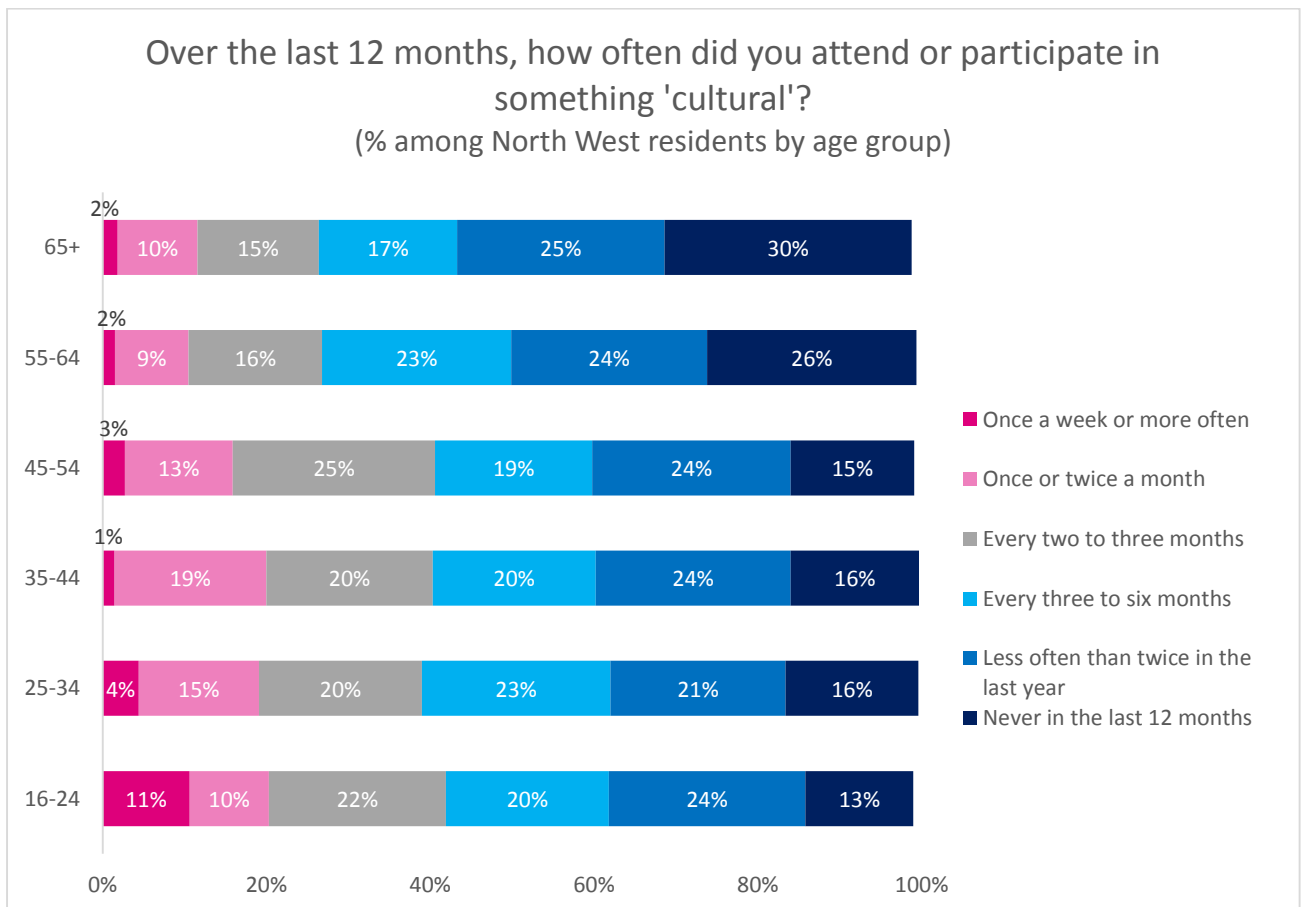
Cultural events North West residents attended (by age group)

 Overrepresented compared to the total average  Underrepresented compared to the total average

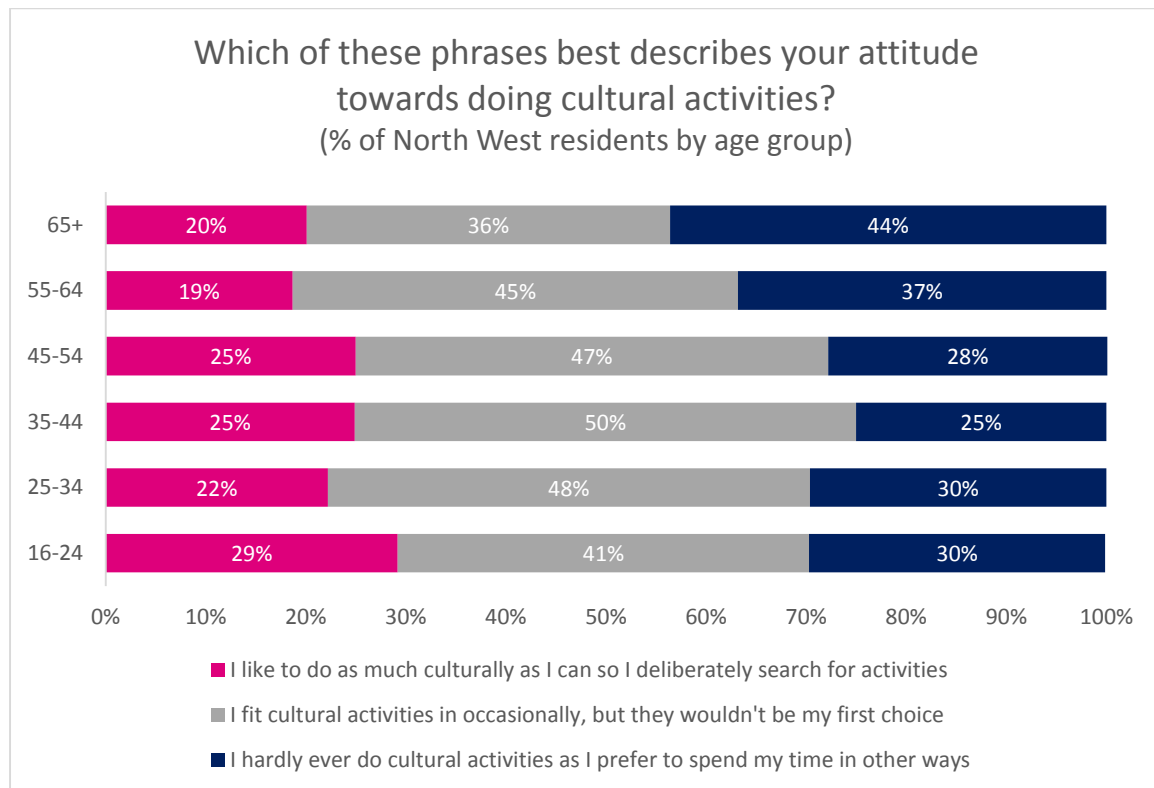
	16-24	25-34	35-44	45-54	55-64	65+
Carnival or parade	67%	67%	64%	65%	50%	46%
Big outdoor event or spectacle	72%	66%	58%	58%	35%	30%
Street performers or Street artists	58%	57%	52%	50%	41%	26%
Rock or pop music	65%	59%	47%	46%	23%	17%
Country music	31%	40%	40%	45%	48%	48%
Folk, traditional or world music	31%	37%	40%	44%	37%	31%
Play or drama	29%	30%	32%	35%	29%	26%
Light entertainment	19%	26%	28%	33%	25%	22%
Jazz or blues music	25%	27%	28%	30%	21%	15%

Folk, traditional or world dance	21%	23%	27%	28%	18%	21%
Musical	25%	24%	23%	26%	21%	19%
Band events	23%	25%	24%	24%	20%	19%
Comedy	26%	32%	24%	25%	15%	9%
Pantomime	21%	19%	28%	23%	13%	13%
An exhibition or collection of art, photography, video, sculpture or other visual art	22%	20%	19%	21%	19%	12%
An exhibition of textiles, pottery, jewellery or other crafts	19%	12%	15%	14%	16%	12%
Techno or electronic music	47%	22%	9%	8%	1%	1%
Talks about arts, culture, language or heritage	14%	11%	10%	16%	10%	8%
Other dance event	14%	9%	9%	13%	6%	6%
Circus arts	7%	15%	18%	8%	4%	1%
Classical music	9%	6%	7%	12%	11%	10%
Literary event	11%	8%	8%	9%	10%	8%
Opera	4%	3%	2%	4%	3%	4%
Ballet	3%	1%	3%	2%	1%	1%

Younger age groups also engage in culture more frequently than older people. In the chart below, you can see that residents age 16-54 engaged more often (at least once every three to six months) compared to those aged 55+.



Attitudinally, North West residents under the age of 55 were more likely to say “I like to do as much culturally as I can...” while people over 55 were more likely to say “I hardly ever do cultural activities...”



Age also has an impact on where people attend and participate in culture. We know that younger people aged 16-24 participate in the most types of cultural activities, so it makes sense that they also have the widest diversity in locations where they participated, being over-represented in 7 of the 13 locations listed. Among people aged 25-44, sports facilities popped: people in this age group were more likely to participate in a cultural activity in a sports facility, and those aged 35-44 were also more likely to attend a cultural event at a sports facility. Residents aged 45-64 were more likely to attend and participate at heritage sites, and people 65 and older were over-represented participating at museums.

Where North West residents participate in cultural activities by age group

■ Overrepresented compared to the total average ■ Underrepresented compared to the total average

	16-24	25-34	35-44	45-54	55-64	65+
In your own home	64%	73%	65%	64%	67%	71%
A community venue	46%	39%	41%	43%	44%	45%
Entertainment venue	35%	33%	30%	31%	20%	15%
Public space	20%	17%	16%	17%	12%	10%
Dedicated arts and culture space	19%	15%	15%	16%	14%	13%
Another private space	17%	15%	15%	10%	15%	11%
Hotel	11%	11%	12%	14%	13%	8%
Sports facility	6%	10%	12%	10%	6%	2%




Heritage site	3%	4%	7%	10%	8%	7%
Museum, heritage centre or historic house	7%	4%	5%	7%	4%	8%
Public library	8%	6%	6%	6%	6%	5%
Art gallery or artist's studio	5%	4%	3%	7%	1%	2%
Temporary space	1%	2%	2%	2%	0%	0%

Where North West residents attend cultural events by age group

■ Overrepresented compared to the total average
 ■ Underrepresented compared to the total average

	16-24	25-34	35-44	45-54	55-64	65+
Entertainment venue	63%	66%	59%	66%	53%	51%
Public space	65%	60%	60%	55%	46%	38%
A community venue	38%	39%	44%	41%	40%	43%
Dedicated arts and culture space	39%	34%	41%	39%	36%	32%
Hotel	25%	27%	27%	31%	31%	30%
Sports facility	16%	15%	18%	13%	8%	7%
Another private space	13%	11%	9%	11%	13%	10%
Museum, heritage centre or historic house	10%	7%	6%	12%	11%	9%
Heritage site	6%	5%	8%	12%	8%	8%
Public library	8%	5%	10%	8%	5%	7%
Art gallery or artist's studio	7%	5%	8%	9%	7%	7%
Temporary space	5%	10%	9%	8%	2%	1%

Who people engaged in culture with also mirrors their life stage:

	16-24's were over-represented with friends or an organised group
	25-54's were over-represented with children under 16
	45+'s were over-represented with children 16+

Who did they attend cultural activities with in the past 12 months?

Overrepresented compared to the total average

Underrepresented compared to the total average

	16-24	25-34	35-44	45-54	55-64	65+
Attended on their own	19%	20%	20%	25%	21%	20%
With friends	87%	52%	43%	42%	47%	39%
With my spouse or partner	10%	52%	68%	65%	59%	48%
With other family members	35%	31%	31%	31%	28%	38%
With my children (under 16 years)	5%	31%	46%	30%	3%	1%
With colleagues	11%	11%	15%	11%	7%	5%
With my children (16 years or older, including adult children)	0%	2%	7%	15%	9%	10%
With an organised group or society	9%	5%	6%	5%	6%	11%

Each age group encounters barriers to cultural engagement that also relate to their life stage:

- For the younger groups, other priorities, price, and lack of transport were barriers to engagement.
- Those aged 35-44 were held back by work, family, or career and not being organised enough.
- Price, lack of companions and poor experiences were barriers for 45-54's.
- Older age groups were held back by health, lack of transport, and access concerns/support.

Barriers to cultural engagement by age group

Overrepresented compared to the total average

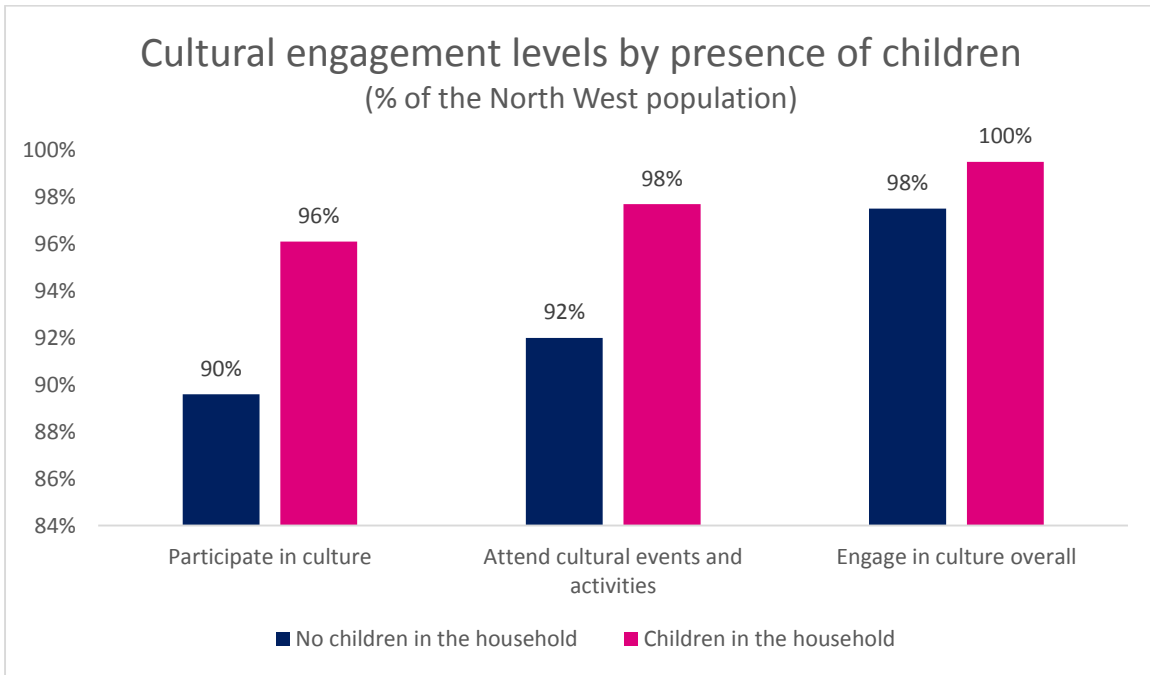
Underrepresented compared to the total average

	16-24	25-34	35-44	45-54	55-64	65+
Other commitments got in the way	27%	30%	32%	31%	22%	16%
Too busy in my free time with other things	28%	31%	28%	28%	17%	14%
It was too far away for me to travel	20%	15%	14%	20%	17%	17%
It was too expensive	21%	16%	13%	18%	11%	8%
Health issues	3%	3%	4%	7%	12%	29%
I couldn't find something I wanted to do	8%	10%	8%	10%	8%	7%
I couldn't get transport to or from the activity	13%	7%	6%	7%	8%	10%
I wasn't organised enough	8%	8%	10%	4%	5%	6%
No-one to go with	5%	4%	4%	8%	5%	8%
I don't like crowds	2%	3%	3%	4%	3%	5%
Poor similar experiences in the past	2%	2%	3%	3%	3%	2%
Concerns about access needs	1%	2%	2%	2%	1%	5%
Not comfortable visiting that venue or area	1%	2%	1%	3%	2%	3%
Requiring additional support from a companion to attend	1%	1%	1%	1%	2%	6%
Other, specify	3%	2%	1%	2%	2%	4%

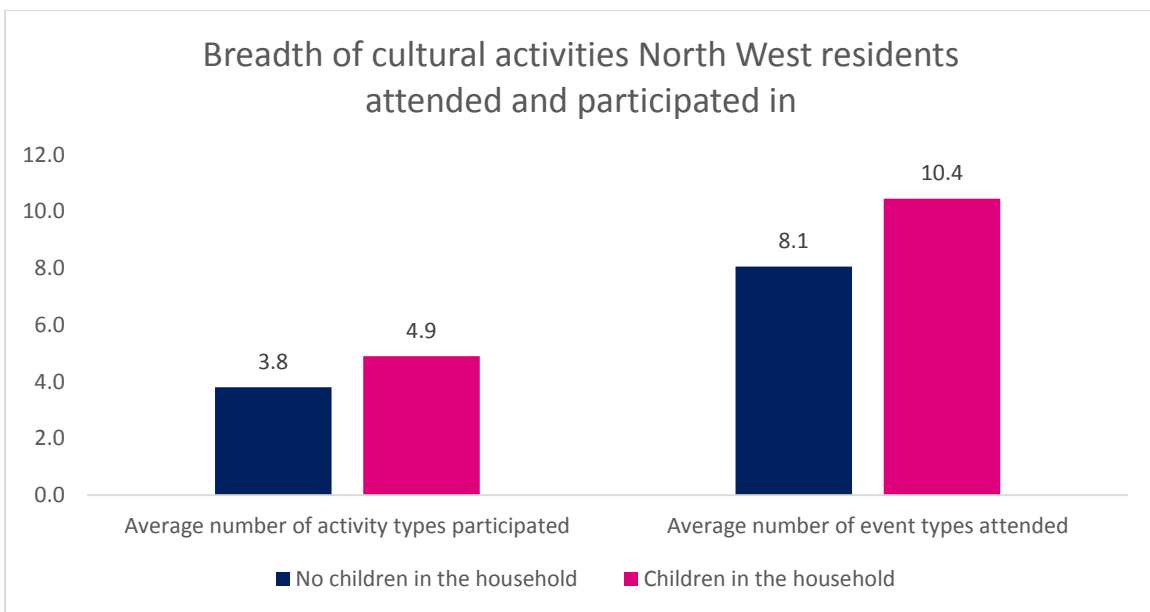
None of these	25%	28%	30%	27%	33%	26%
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Presence of children

Those with children in the home were more likely to participate, attend, and engage with culture compared to those without children. 100% of those with children in the household engaged in culture overall.



North West residents with children were also more likely to attend and participate in a broader range of activities. On average, people with children participated in 4 types of cultural activities and attended 10 types of cultural events.



Presence of children also had an impact on the type of activities they participated in and events they attended. Parents were more likely to read out loud, create visual art and crafts, and volunteer within the sector, among other activities shown below. Parents were also more likely to attend large outdoor events, rock or pop concerts, comedy, pantomime, talks, circus, and ballet.

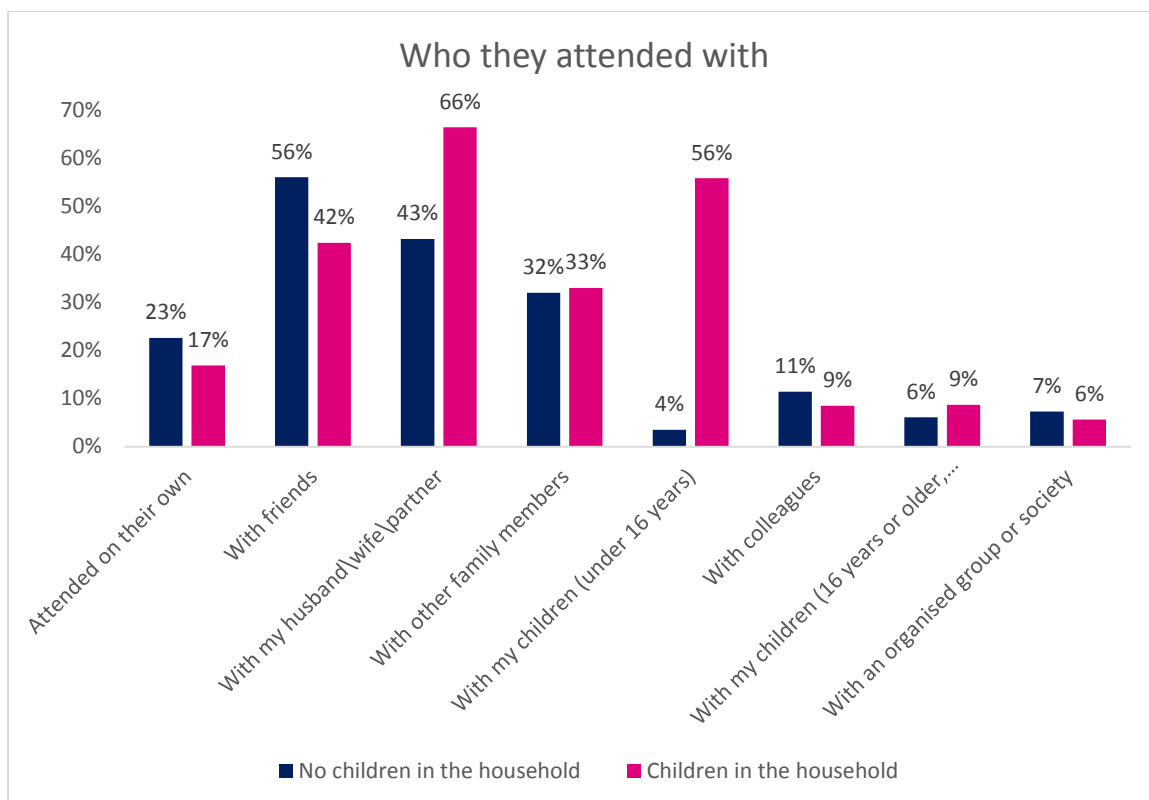
Cultural activities that parents were more likely to participate in

	No children in the household	Children in the household
Read out loud to children	31%	73%
Painting, drawing, printmaking or sculpture	13%	24%
Read out loud to adults	14%	21%
Photography (not selfies, family or holiday snaps)	10%	16%
Volunteering or campaigning to support arts, culture or heritage	8%	11%
Other crafts such as model-making, ceramics or jewellery making	4%	9%
Recited Poetry, Folklore or storytelling (not bedtime story telling)	4%	7%
Performed in a Marching Band or Carnival Parade	4%	6%
Made films or videos (not family or holiday)	3%	5%
Created a game, digital animation or built a world within a game (e.g. minecraft)	2%	4%
Written plays	0.6%	1.2%
Performed circus, clowning or mime	0.6%	1.0%

Cultural events that parents were more likely to attend

	No children in the household	Children in the household
Big outdoor event or spectacle	46%	68%
Rock or pop music	38%	51%
Comedy	19%	27%
Pantomime	14%	32%
Talks about arts, culture, language or heritage (e.g. with performers, artists, specialists)	10%	14%
Circus arts (e.g. clowning, acrobatics)	4%	20%
Ballet	1.6%	2.1%

Presence of children also has an impact on who they go to cultural events and activities with. As expected, those with children were less likely to go on their own, and more likely to attend with their families. This includes a spouse or partner, children under 16, and children 16+ (including adult children).



Presence of children also had an impact on where they attended cultural activities. People with children in the household were more likely to attend a public space, community venue, sports facility, museum or heritage site, art gallery, and temporary space. This suggests that open spaces such as public spaces, community venues, or sports facilities may appeal to parents, as children can run about and have the freedom to be themselves. Public libraries, while quiet, also provide events and activities for children, which may be another reason why parents are more likely to go there compared to those without children. It also makes sense that parents are more likely to attend museums and heritage sites as those places are great learning spaces for children and often have outdoor areas where children can run and explore.

Where North West residents attend cultural activities

■ Overrepresented compared to the total average
 ■ Underrepresented compared to the total average

	No children in the household	Children in the household
Entertainment venue (e.g. arenas, pubs\clubs, coffee shop, comedy clubs)	59%	61%
Public space (e.g. on street, playing fields, parks, beaches)	51%	61%
A community venue (e.g. School, Church, Town\Parish Hall, community centre)	39%	45%
Dedicated arts and culture space (e.g. arts centre, concert hall, theatre)	37%	37%

Hotel	30%	25%
Sports facility (e.g. GAA club, leisure centre)	11%	17%
Another private space (e.g. someone's house, location not open to the general public)	11%	10%
Museum, heritage centre or historic house	8%	10%
Heritage site (e.g. castle\ruin, archaeological site, National Park, nature reserve)	7%	9%
Public library	6%	10%
Art gallery or artist's studio	6%	9%
Temporary space (e.g. Circus Tent)	4%	11%

What other factors have an impact on cultural engagement?

In addition to age and presence of children, we looked at other cuts of data to see what demographic factors had an impact on engagement levels. The factors we looked at were:

- Disability
- Social grade
- Gender

Disability

As we saw an overwhelming amount of NW residents engaging in culture, the level of engagement from Disabled People is not far behind.

95% engaged in culture. 88% participated and 85% attended.

Although Disabled People in the North West were still participating in culture, we noticed that there was a **9% gap in attendance** compared to the general population. Furthermore, they're not engaged as often. They were more likely to engage less than twice in the past year, or never in the past year.

The data suggests that they may feel more comfortable **participating in their own home**. Disabled People were slightly over-represented participating in culture in their own home (+8%) and at a public library (+2%). For attendance, there was no single place where they were over-represented.

The activities they did participate in are ones they could do by themselves. Of the 31 activities listed for cultural participation, Disabled People were over-represented in only two items: textile crafts and writing stories, poetry or comics.

Disabled People in the North West **need assistance** from others to engage in culture. Compared to the total average, they were more likely to engage in culture with other family members or as part of an organised group/society. They were the least likely group to engage in culture alone.

This can be explained by their barriers to cultural engagement.

Compared to the total average, disabled people in the North West were:

- **Five times** as likely to say their health issues posed a barrier.
- Nearly **four times** as likely to say they had concerns about access needs.
- Nearly **four times** as likely to say they require additional support from a companion to attend.

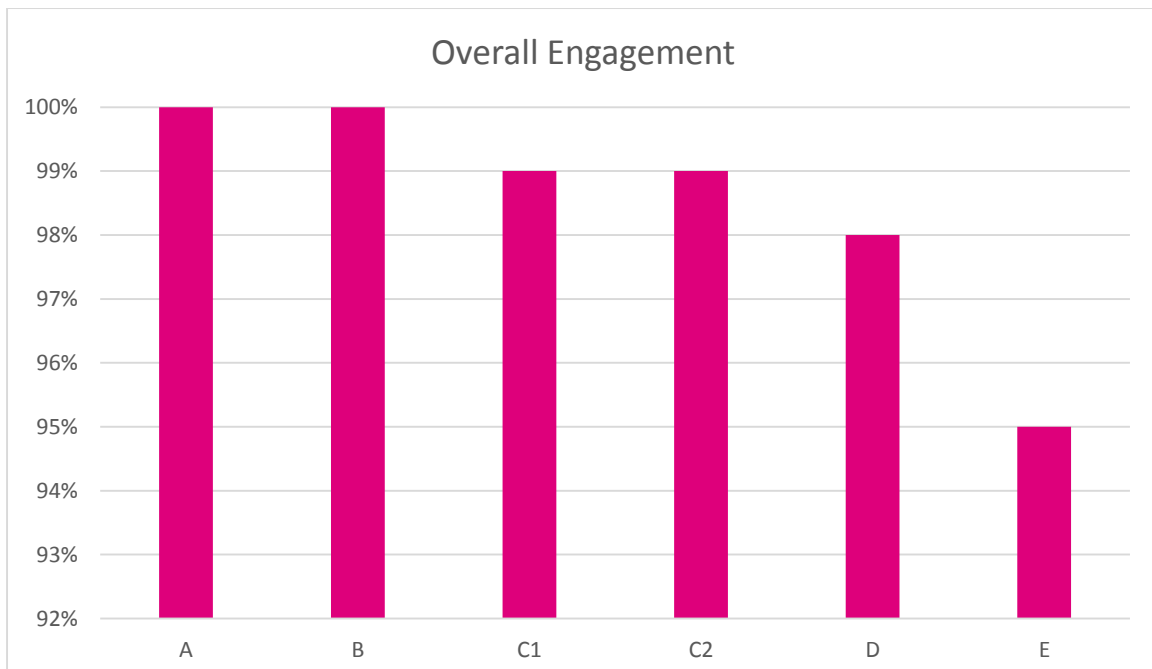
These people need help and support to engage in culture. It's not just about physical access, but access to information and additional support to ensure they can engage in culture with a companion.

Social grade

The social grades are as follow:

Grade	Social Class	Chief income earner's occupation
A	Upper Middle Class	Higher managerial, administrative or professional
B	Middle Class	Intermediate managerial, administrative or professional
C1	Lower Middle Class	Supervisory or clerical and junior managerial, administrative or professional
C2	Skilled Working Class	Skilled manual workers
D	Working Class	Semi-skilled and unskilled manual workers
E	Non-Working	State pensioners, boomers, casual and lowest grade workers, unemployed with state benefits only

The higher the class, the higher the prevalence of cultural engagement:



Higher classes (A, B) participated in **more than twice as many types of activities and visited over twice as many types of places** compared to the lowest class (E).

Over the last 12 months, ABC1s engaged in culture more often (either once/twice a month, or once every two to three months) than C2DEs.

Places ABC1s visited the most are temporary spaces, art galleries and studios, public libraries, museums and heritage sites, and dedicated arts/culture spaces. In comparison, C2DEs scored the lowest in museums and heritage sites, arts galleries and surprisingly, public libraries.

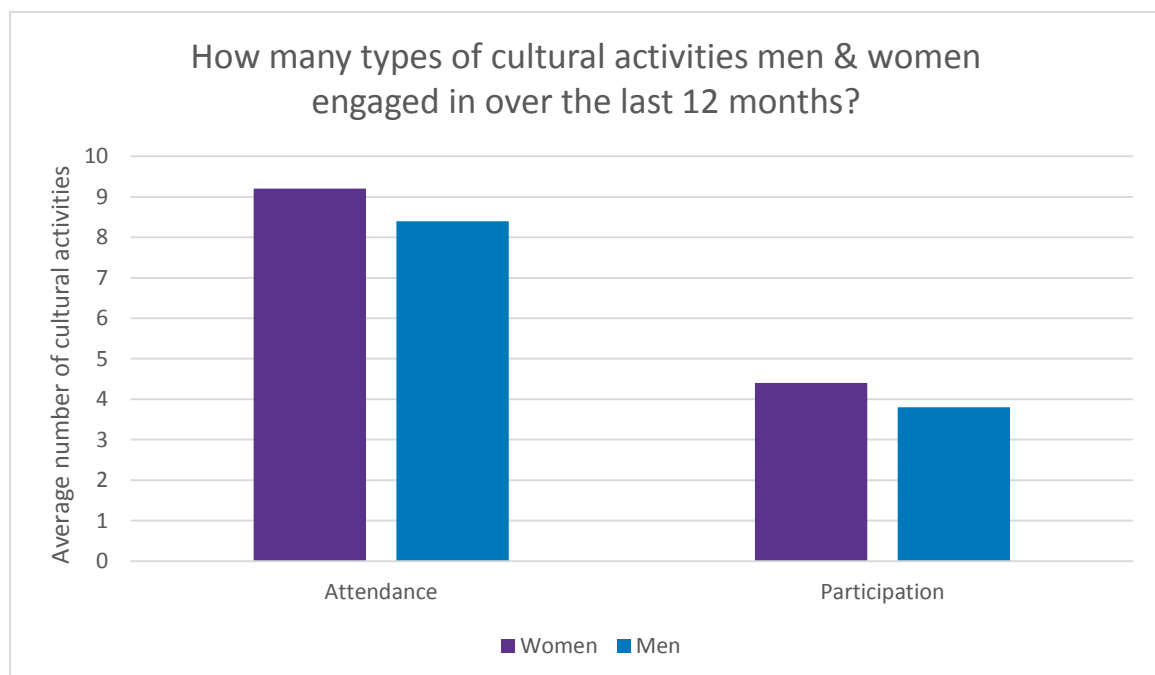
ABC1s were more likely than C2DEs (36% and 20%, respectively) to cross the border to engage in cultural activities.

Compared to the total average, C2DE's were more likely to report the following as barriers to cultural engagement:

- Health issues
- Lack of transport to/from the activity
- Not comfortable visiting that venue or area
- Requiring additional support from a companion to attend
- Other

Gender

The level of cultural engagement (98%) and attendance (94%) was the same for both men and women. However, there was a 6% gap in participation. Women participated less than men (89% vs. 95%). On the other hand, women were more likely to attend and participate in a wider variety of activities than men.



Gender had very little impact on how frequently they engage in culture and how often they cross the border for culture. While gender also had little impact on the places they visited, it did have an impact on where they participated in culture:

- Men were more likely to participate in culture in public spaces, sports facilities and museums.
- Women were more likely to participate in public libraries.

Gender also had an impact on who they went with to engage in culture:

- Men were more likely to engage in culture on their own.
- Women, with other family members or with children under 16.

Regarding barriers to cultural engagement, men were slightly more likely to say they couldn't find something to do. Women were more likely to say they weren't comfortable visiting a venue or area.

Gender had the largest impact on the types of things people participated in and attended. Places and activities people in the NW were more likely to engage in were:



Attendance:

- Techno or electronic music concert

Participation:

- Wood crafts
- Heritage or conservation project/group
- Traditional building skills
- Written songs or composed music
- Created a game, digital animation, or built a world within a game

Attendance:

- Musicals
- Pantomimes
- Visual arts exhibition
- Other dance event (e.g., contemporary dance)
- Ballet

Participation:

- Read out loud to children
- Dance
- Textile crafts
- Other crafts (e.g., model-making, ceramics, jewellery-making)
- Participate in a book club group
- Act in a play/drama
- Act or sing in musical theatre



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