

Armagh City Banbridge & Craigavon Borough

TOURISM, ARTS & CULTURE REPORT

AUGUST 2016

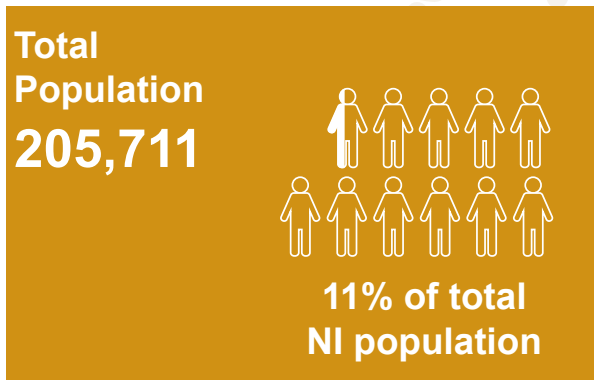


Armagh City
Banbridge
& Craigavon
Borough Council

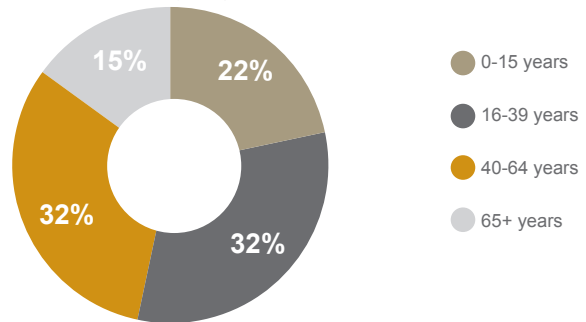
INTRODUCTION

The purpose of this document is to provide an overview of the topics relating to tourism, arts and culture in Armagh City, Banbridge and Craigavon Borough to help inform the development of a community plan.

KEY FINDINGS



Population by Age

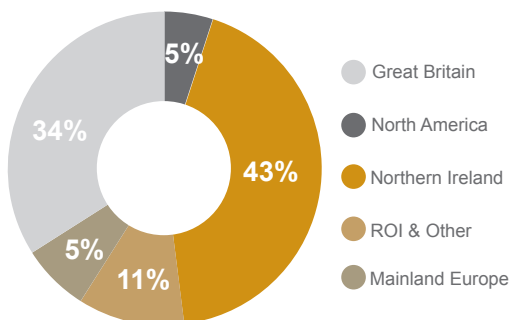


Tourism

Overnight trips (2015)

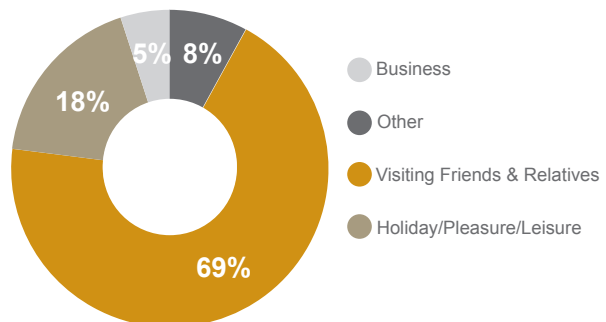


Place of Origin

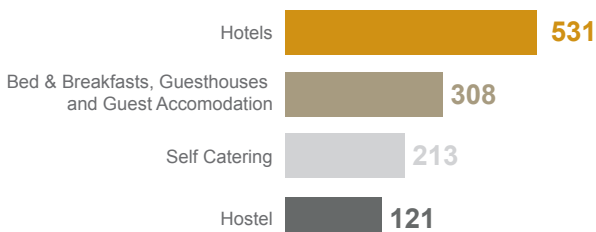


2013 - 2015

Reason for Visit



Accommodation (2015)



Room Occupancy Rates



Visitor Attractions (2015)



Top three attractions

220,928
visits
Oxford Island National
Nature Reserve

209,027
visits
Kinnego Marina

133,437
visits
Lough Neagh
Discovery Centre



Top three parks and gardens

140,074
visits
Edenvilla Park
& Garden

139,435
visits
Tannaghmore
Gardens & Rare Breed
Animal Farm

126,123
visits
Peatlands Park

Arts and Culture

Engagement in Arts and Culture

85%

of adults in Northern Ireland
had engaged in arts/cultural
activities in the previous
12 months (2015/16)



Arts
attendance

Armagh City,
Banbridge &
Craigavon

77%

Northern
Ireland

78%



Arts
participation

34%

32%



Used the public
library service

27%

30%



Visited a museum
or science centre

41%

47%

(2011/12 - 2013/14)

Cultural Deprivation Index (2014)

Top three most deprived areas
- proximity to cultural facilities



Arts

Katesbridge

Gransha

Bannside



Library

The Birches 2

Killylea

Markethill



Museum

Gransha

Rathfriland

Derrynoose

Libraries (2014)

89%
households in NI
lived within

2 miles
of a
library service

Top factors influencing engagement in
the arts- adults in Northern Ireland (2011)

Find it
enjoyable

71%

Attend to see
a specific show

41%

Access to good
arts venues

25%

Adults with no intention
of engaging in the arts

19%

Local Authority Arts and Culture Expenditure (2013/14)



£2.63
million

£13

per head

Volunteering - Northern Ireland (2013/14)



11%

of adults in Northern Ireland
had volunteered in arts and
culture (Continuous
Household Survey)

Top three volunteering roles

41%



Fundraising

21%



Teaching

20%



Event
management

POPULATION

In 2014 the population of the Borough was estimated at 205,711 (11.2% of the total NI population). The Borough has a similar age profile to NI, with the majority (63%) being working age (16-64 years).

The 2014 based population projections show the population of the Borough is projected to increase by 10.4% or almost 21,400 people to 2024 - almost double the rate of population increase projected for NI as a whole (5.3% increase). As with NI as a whole the Borough has both a growing and ageing population.

The number of children (i.e. those aged 0-15) is projected to increase by 4,400 people (9.6%) from 45,700 to 50,100.

The working age population (i.e. those aged 16-64) is projected to increase by 8,600 people (6.6%) from 129,800 in mid-2014 to 138,400 in mid-2024.

The number of those aged 65 and over is projected to increase by 8,500 people (28.0%) from 30,200 to 38,700 over the ten years from mid-2014 to mid-2024. Within this group, the number of people aged 85 and over is projected to increase by 1,700 people (50.1%).

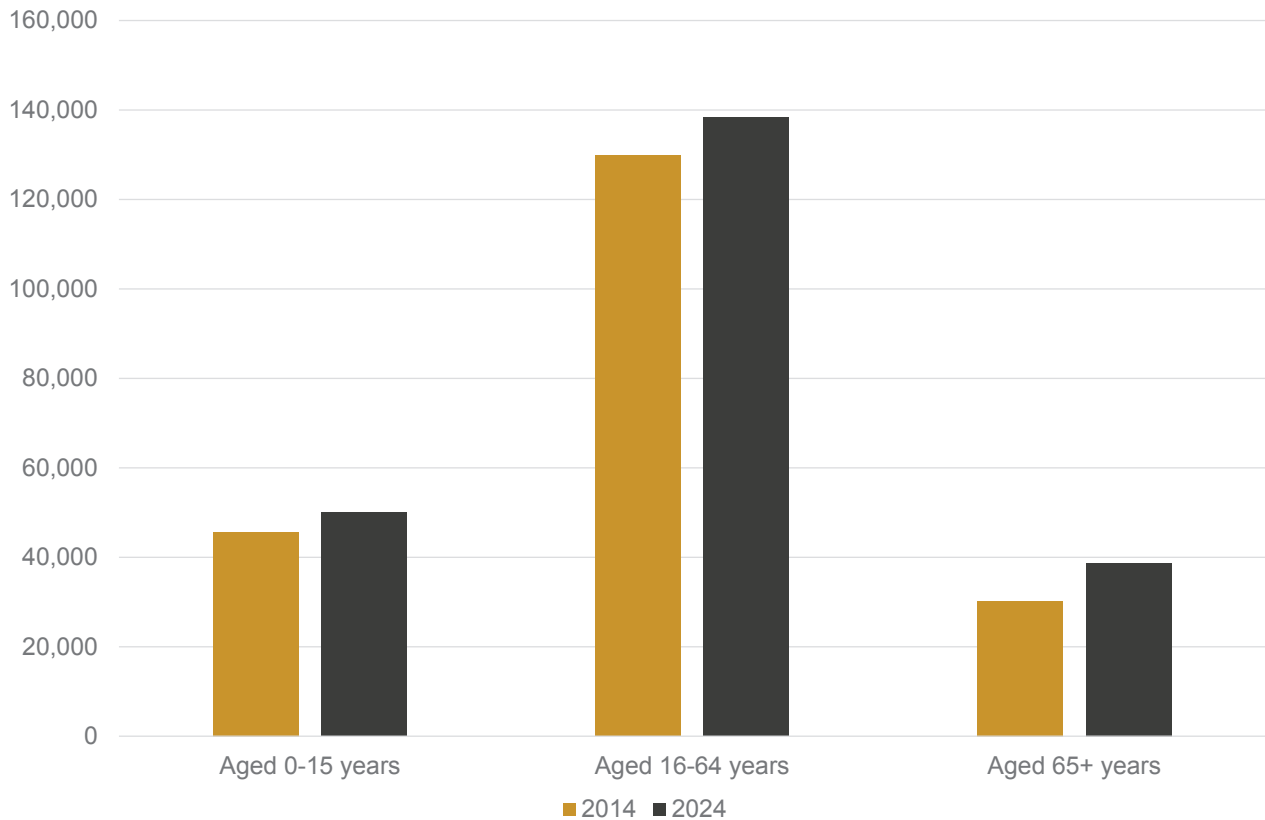


Figure 1. Population, Armagh City, Banbridge and Craigavon 2014 - 2024. Source: NISRA.

The number of households is projected to increase from 77,762 in 2014 to 85,688 in 2024, an extra 7,926 households or a 10% increase (2012 based household projections). This is higher than the increase projected for NI overall (6%). The average household size in the council area (2.63) was slightly higher than NI (2.54), but both are expected to decrease over time.

TOURISM

A range of statistics are available at Local Government District (LGD) level: overnight trips and associated expenditure, rooms sold in commercial accommodation, visitor attraction numbers and tourism employment. No single measure can be used to provide a definitive statistic on tourism, a variety of measures are presented to paint a more complete picture.

Overnight Trips

Of all overnight trips to Northern Ireland in 2015, 3% (149,000 trips) were to Armagh City, Banbridge and Craigavon Borough (ranked 10th for trips across the 11 LGDs). Almost half of overnight trips in Northern Ireland were to Belfast (29%) and Causeway Coast and Glens (20%). Expenditure broadly follows the number of overnight trips. In 2015, £22.5 million was spent on overnight trips in Armagh City, Banbridge and Craigavon, the second lowest amount in all the councils and 3% of the total expenditure on overnight trips in NI. Expenditure per overnight trip was £150 in the Borough compared to £164 for NI overall. In terms of accommodation, the number of bed spaces available has a similar pattern to overnight trips, there were 1,173 bed spaces in the Borough, the second lowest number of all the council areas and 3% of all bed spaces in Northern Ireland.

	Overnight trips		Nights		Expenditure		Expenditure per over-night trip	Bed spaces	
	n	% of NI	n	% of NI	£	% of NI	£	n	% of NI
Antrim and Newtownabbey	204,290	4%	672,902	4%	34,164,529	4%	167	3,384	8%
Ards and North Down	376,755	8%	1,397,895	9%	51,013,302	7%	135	1,878	4%
Armagh City, Banbridge and Craigavon	149,449	3%	562,866	4%	22,476,581	3%	150	1,173	3%
Belfast	1,361,193	29%	4,237,733	27%	278,034,119	37%	204	10,976	25%
Causeway Coast and Glens	911,388	20%	3,141,914	20%	136,770,965	18%	150	10,285	24%
Derry City and Strabane	223,172	5%	889,416	6%	42,502,028	6%	190	3,349	8%
Fermanagh and Omagh	341,051	7%	1,136,816	7%	54,585,277	7%	160	4,079	9%
Lisburn and Castlereagh	130,924	3%	714,336	5%	24,910,212	3%	190	1,072	2%
Mid and East Antrim	382,224	8%	1,007,755	7%	45,628,631	6%	119	1,947	4%
Mid Ulster	155,708	3%	613,667	4%	22,285,891	3%	143	1,189	3%
Newry, Mourne and Down	404,442	9%	1,056,896	7%	47,736,730	6%	118	4,283	10%
Northern Ireland	4,640,596	100%	15,432,195	100%	760,108,265	100%	164	43,615	100%

Table 1. Estimated overnight trips, nights, expenditure and bed spaces by Local Government District, 2015. Source: NISRA.

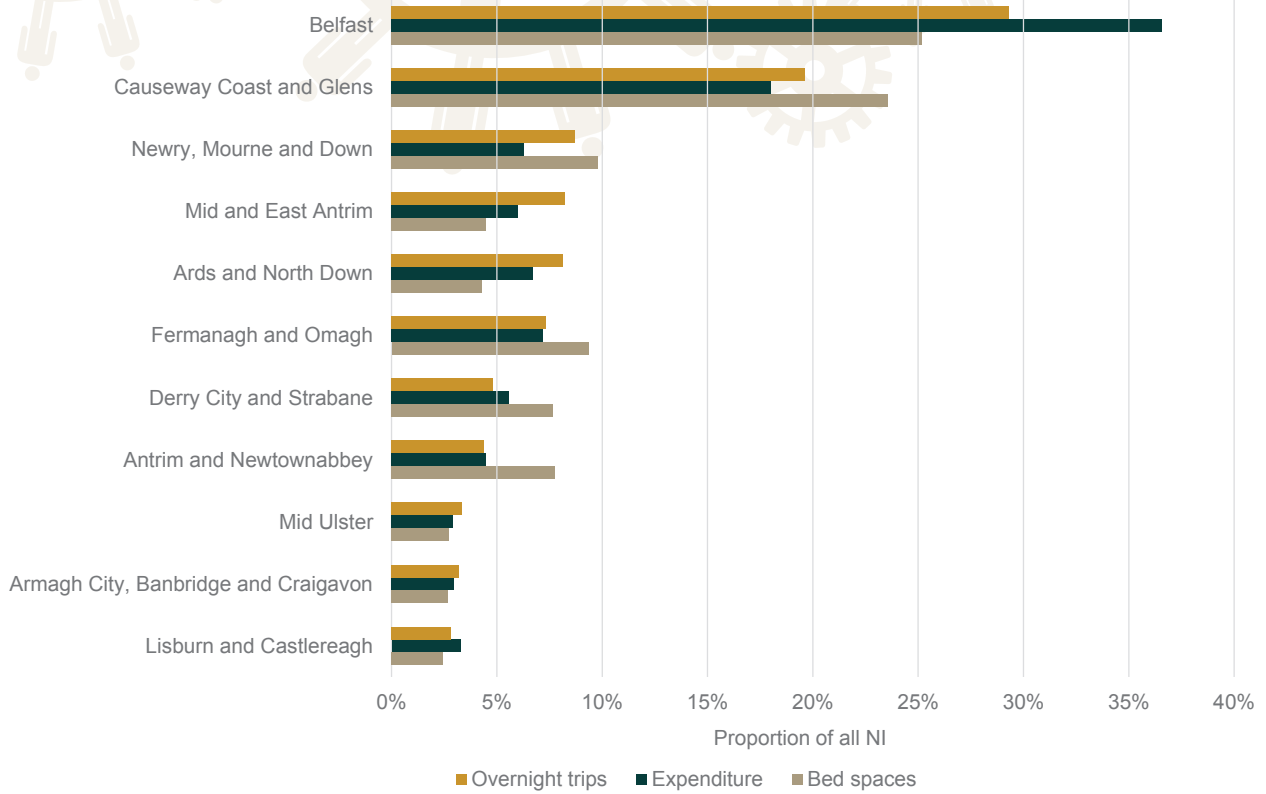


Figure 2. Proportion of Northern Ireland overnight trips, expenditure and bed spaces by Local Government District, 2015. Source: NISRA.

In 2013-2015, the majority of overnight trips to Armagh City, Banbridge and Craigavon Borough were to visit friends and relatives (69%), the highest proportion of all council areas. This was followed by holiday/pleasure/ leisure (18%), the lowest proportion of all council areas, and then business (5%). These compare to NI averages of 41% for visiting friends and relatives, 44% for holiday/ pleasure/ leisure and 9% for business. Looking at the origin of visitors, almost three fifths (57%) of overnight visitors to the Borough were from outside Northern Ireland (51% NI overall).

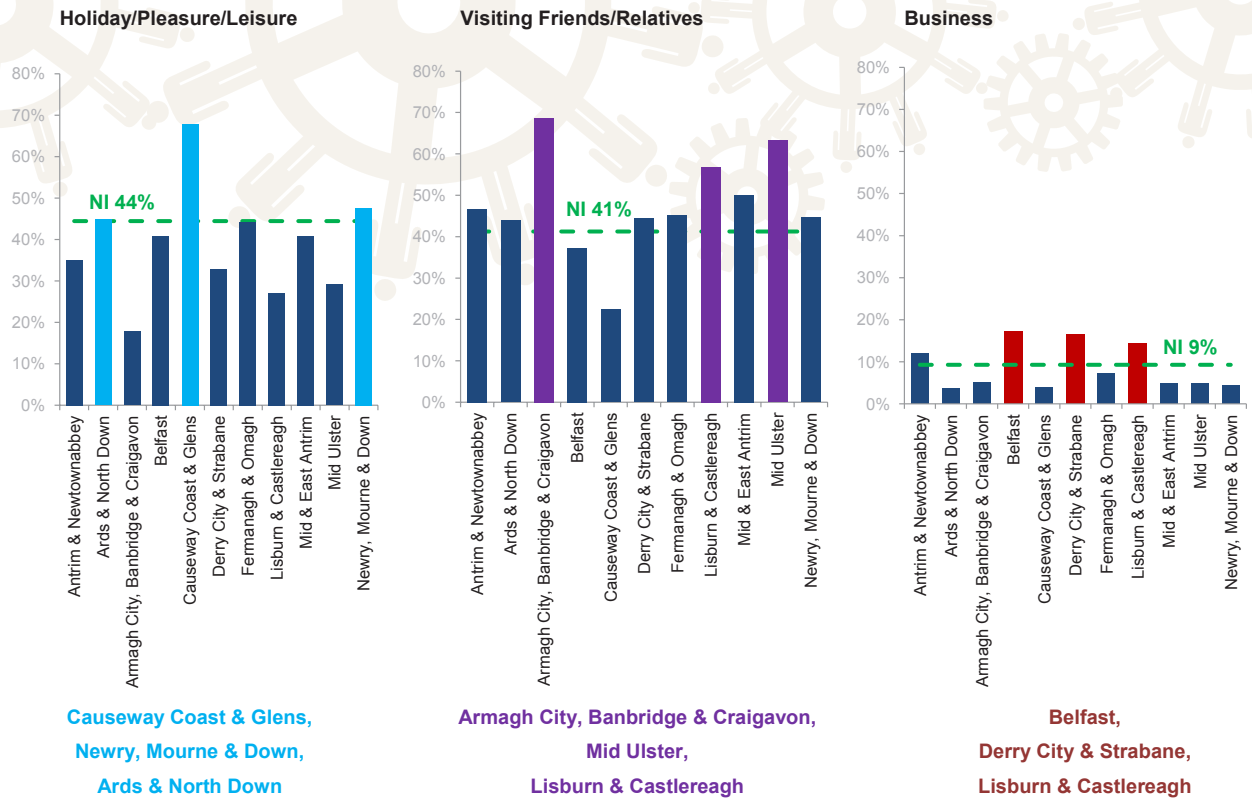


Figure 3. Reason for overnight trips in Northern Ireland by Local Government District (2013-2015). Source: NISRA.

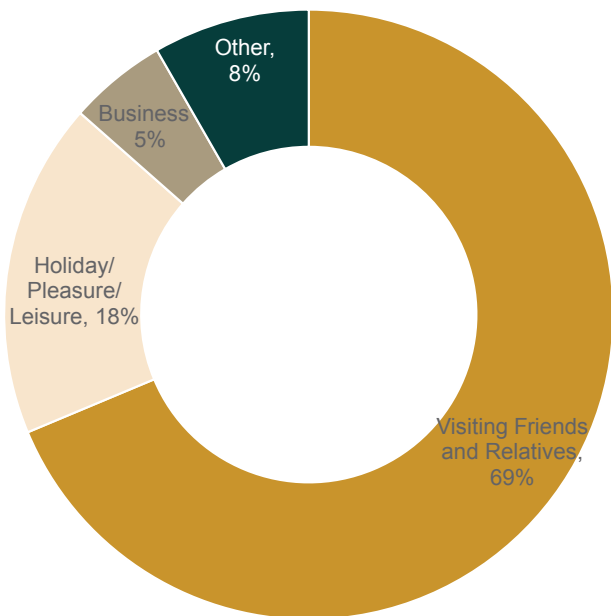


Figure 4. Proportion of overnight trips in Armagh City, Banbridge and Craigavon Borough by reason for visit (2013-2015). Source: NISRA.

Measuring overnight trips

Two key measures of tourism activity are the number of overnight trips and the associated expenditure. To estimate these measures two sets of rolling annual surveys are undertaken:

- (i) Firstly, surveys of passengers at air and sea ports in Northern Ireland and the Republic of Ireland are undertaken to identify overnight trips to Northern Ireland by people living outside the island of Ireland.
- (ii) Secondly, household surveys in Northern Ireland and the Republic of Ireland are undertaken to identify Northern Ireland based overnight trips of Northern Ireland and Republic of Ireland residents.

Overnight trip statistics are measured using UN definitions, 'overnighting' is broadly defined as staying away from your usual place of residence for one night or more. It can be for a holiday, to visit relatives, business etc. As well as overnighting visitors to NI the statistics also include overnight stays of local residents. Overnighting excludes day trips, which will be a significant part of the local tourism market.

Accommodation

The availability of commercial accommodation is an indicator of the supply side of tourism. In 2015 Armagh City, Banbridge and Craigavon had 1,173 beds available in licensed accommodation, the second lowest number of beds available of the 11 council areas. Just under half, 513, of the available beds were in hotels (3% of NI total), followed by 308 in Bed & Breakfasts, Guesthouses and Guest Accommodation (4% of NI total), 213 in Self-Catering (2% of NI total) and 121 bed spaces in Hostels. The level of accommodation in terms of bed spaces in the Borough has been similar over the last five years (2011 – 2015).

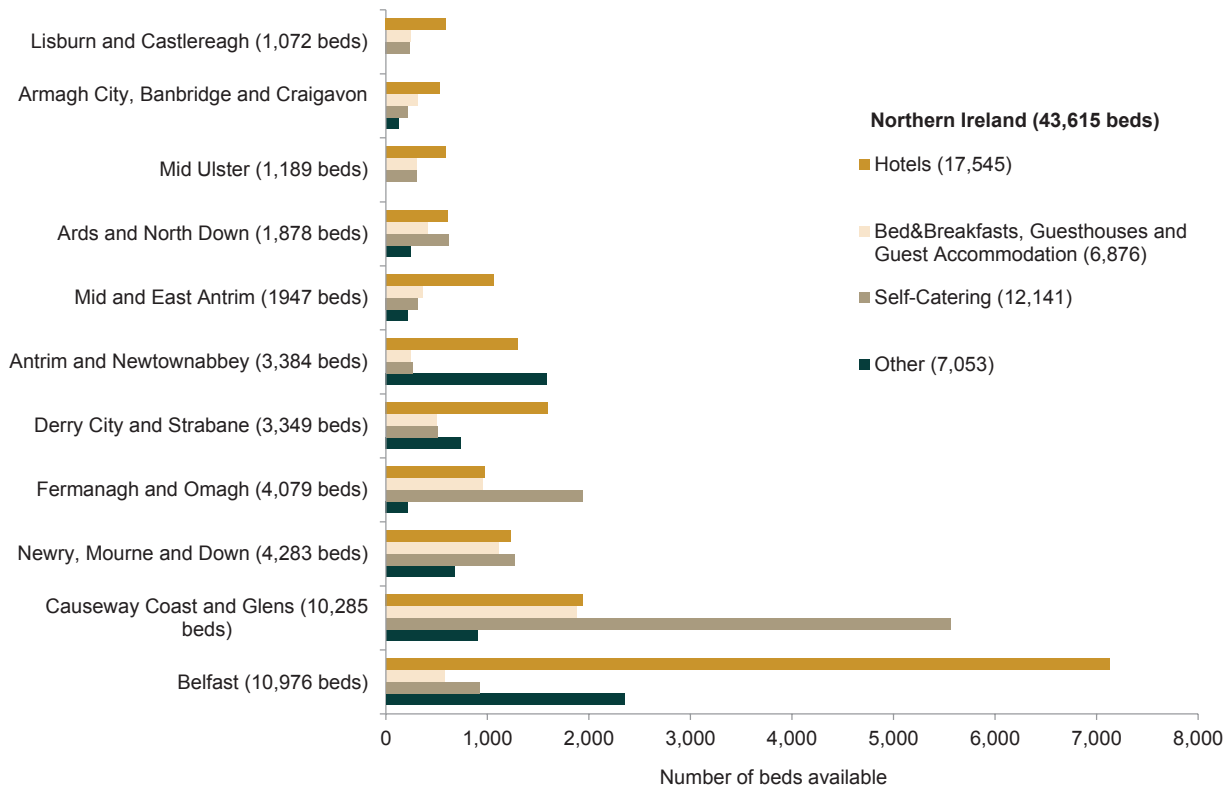


Figure 5. Number of beds available in licensed accommodation by accommodation type and Local Government District, 2015. Source: NISRA.

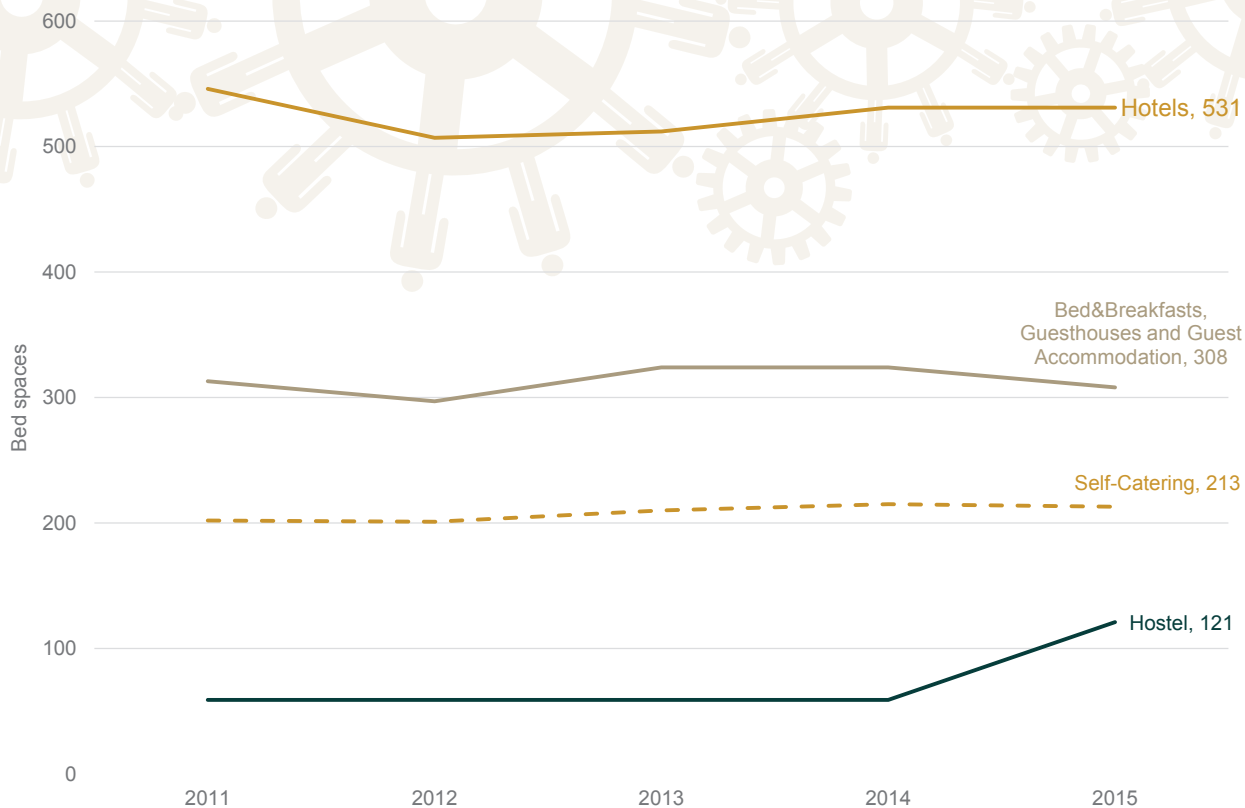


Figure 6. Bed spaces in certified tourism stock in Armagh City, Banbridge and Craigavon Borough, 2011 - 2015. Source: NISRA

In 2015 in the Borough, the hotel room occupancy rate was 55% and bed space occupancy 37% (both lower than the overall NI hotel room occupancy of 67% and bed space occupancy of 50%). The council also had lower occupancy rates than NI overall in bed & breakfast, guesthouses, and guest accommodation with room occupancy of 16% and bed space of 11%. Occupancy levels for self-catering units in the Borough (annual 37%, peak season Apr-Sep 49%) were similar to NI overall (annual 36% and peak season 48%).

There were over 40,000 hotel rooms sold and over 70,000 hotel bed spaces sold in Armagh City, Banbridge and Craigavon during 2015. Over the five years (2011 – 2015) there were on average 39,700 rooms and 65,500 bed-spaces sold.

	2011		2012		2013		2014		2015	
	Room	Bed space	Room	Bed space	Room	Bed space	Room	Bed space	Room	Bed space
Antrim and Newtownabbey	47%	32%	50%	36%	50%	35%	58%	41%	61%	44%
Ards and North Down	49%	38%	53%	41%	55%	39%	56%	44%	54%	44%
Armagh City, Banbridge and Craigavon	49%	34%	44%	28%	54%	33%	56%	38%	55%	37%
Belfast	63%	47%	73%	55%	72%	55%	74%	51%	77%	60%
Causeway Coast and Glens	57%	38%	59%	38%	58%	39%	59%	39%	59%	38%
Derry City and Strabane	61%	45%	61%	45%	68%	46%	60%	46%	59%	47%
Fermanagh and Omagh	55%	46%	65%	51%	58%	44%	59%	49%	59%	49%
Lisburn and Castlereagh	55%	38%	63%	39%	57%	38%	52%	37%	*	*
Mid and East Antrim	47%	35%	56%	46%	53%	41%	62%	49%	64%	51%
Mid Ulster	45%	34%	46%	32%	42%	31%	47%	33%	48%	37%
Newry, Mourne and Down	53%	42%	57%	44%	59%	42%	52%	40%	55%	43%
Northern Ireland	57%	42%	64%	47%	64%	46%	65%	46%	67%	50%

Table 2. Hotel occupancy rates by Local Government District, 2011-2015. Source: NISRA. * Sample size too small to provide a reliable estimate.

	2011	2012	2013	2014	2015*
Rooms sold	43,946	35,187	38,750	39,975	40,468
Bed spaces sold	74,768	53,847	58,256	70,145	70,361

Table 3. Hotel rooms and bed spaces sold in Armagh City, Banbridge & Craigavon 2011-2015. Source: NISRA. Note - The 2015 bed spaces sold figures have been calculated excluding those who have not provided the appropriate breakdown of information therefore a different weight has been applied.

	2013		2014		2015	
	Room occupancy	Bed space occupancy	Room occupancy	Bed space occupancy	Room occupancy	Bed space occupancy
Antrim and Newtownabbey	20%	12%	13%	10%	23%	17%
Ards and North Down	13%	9%	21%	15%	18%	13%
Armagh City, Banbridge and Craigavon	17%	12%	23%	17%	16%	11%
Belfast	61%	53%	43%	29%	61%	41%
Causeway Coast and Glens	28%	21%	33%	26%	28%	23%
Derry City and Strabane	18%	12%	28%	21%	13%	10%
Fermanagh and Omagh	27%	20%	26%	18%	30%	21%
Lisburn and Castlereagh	28%	21%	30%	19%	39%	30%
Mid and East Antrim	24%	19%	23%	22%	44%	34%
Mid Ulster	34%	25%	19%	16%	28%	21%
Newry, Mourne and Down	20%	15%	25%	19%	17%	12%
Northern Ireland	30%	22%	28%	21%	27%	20%

Table 4. Bed & breakfast, guesthouses and guest accommodation occupancy rates by Local Government District, 2013 - 2015. Source NISRA.

	2011		2012		2013		2014		2015	
	Annual	Peak	Annual	Peak	Annual	Peak	Annual	Peak	Annual	Peak
Antrim and Newtownabbey	17%	21%	17%	24%	30%	34%	25%	32%	26%	37%
Ards and North Down	21%	27%	29%	41%	30%	35%	28%	35%	32%	44%
Armagh City, Banbridge and Craigavon	25%	36%	17%	22%	26%	29%	28%	36%	37%	49%
Belfast	44%	49%	42%	49%	63%	71%	63%	68%	67%	70%
Causeway Coast and Glens	27%	44%	25%	40%	27%	42%	28%	41%	33%	48%
Derry City and Strabane	17%	24%	19%	24%	31%	37%	36%	50%	36%	42%
Fermanagh and Omagh	28%	41%	30%	45%	30%	42%	37%	53%	34%	48%
Lisburn and Castlereagh	32%	36%	30%	39%	54%	51%	36%	30%	28%	34%
Mid and East Antrim	24%	34%	32%	48%	29%	38%	35%	44%	45%	57%
Mid Ulster	24%	33%	26%	31%	25%	24%	19%	24%	22%	30%
Newry, Mourne and Down	24%	36%	27%	39%	27%	39%	29%	43%	29%	42%
Northern Ireland	27%	40%	27%	41%	31%	42%	33%	45%	36%	48%

Table 5. Self-catering unit occupancy rates by Local Government District, 2011-2015. Source: NISRA. Note peak season = April - September.

Jobs In Tourism Characteristic Industries

Employee jobs in tourism characteristic industries relate to a number of different business areas, most notably hotels and restaurants. In 2013 there were 68,000 employee jobs in Armagh City, Banbridge and Craigavon Borough, of which 4,200 or 6% were in tourism characteristic industries (the lowest proportion of the 11 councils). Belfast had the largest number of employee jobs in tourism characteristic industries, but proportionally Ards and North Down and Causeway Coast and Glens both had over 12% of local employment in the tourism industry.

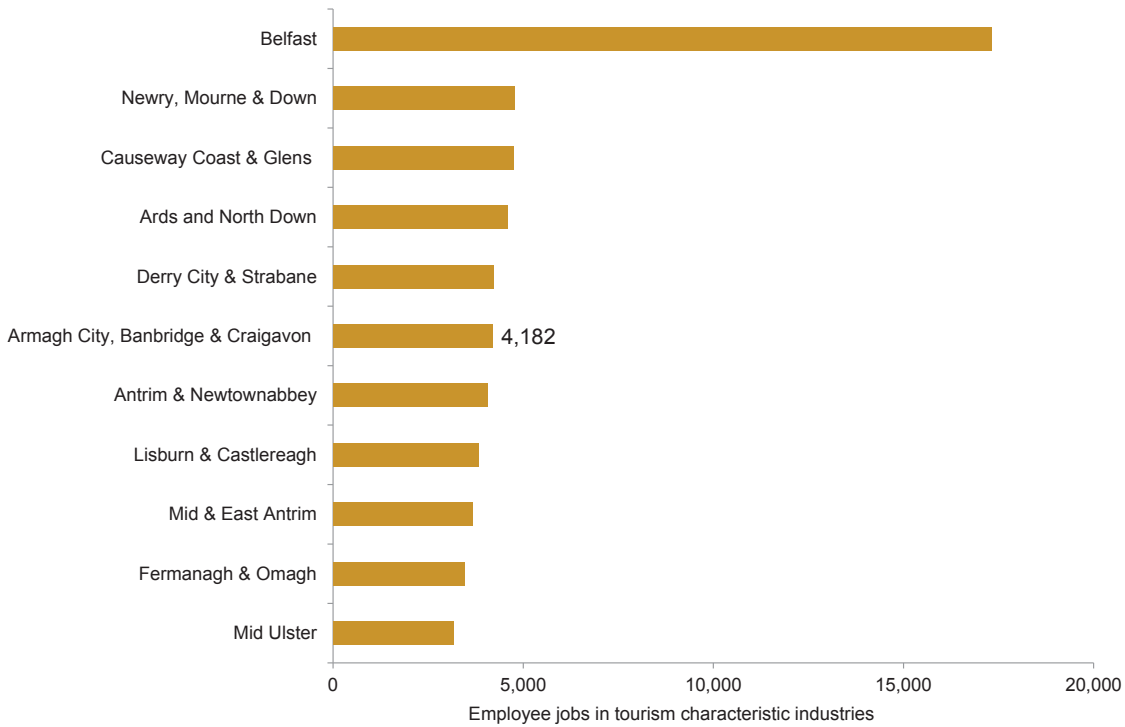


Figure 7. Employee jobs in tourism characteristic industries by Local Government District, 2013. Source: NISRA, Tourism NI annual statistics and NI Census of Employment, September 2013.

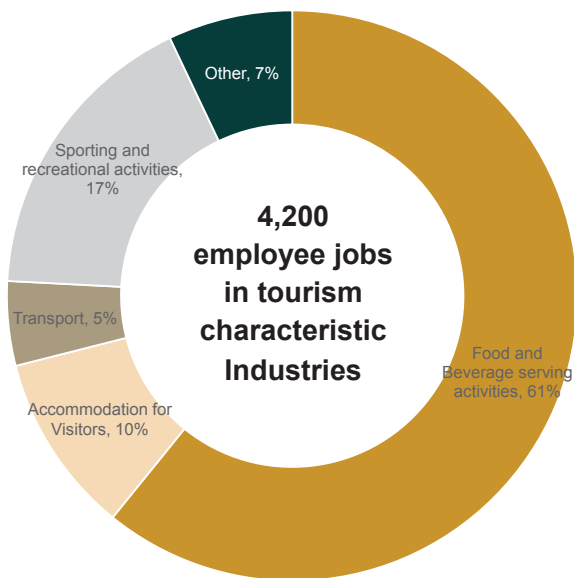


Figure 8. Employee jobs in tourism characteristic industries by type, Armagh City, Banbridge and Craigavon, 2013. Source: NISRA, Tourism NI annual statistics and NI Census of Employment 2013.

Visitor Attractions

In 2015 the top three visitor attractions in Northern Ireland were the Giant's Causeway (0.85 million visits), Titanic Belfast (0.62 million) and the Ulster Museum Belfast (0.47 million).

In Armagh City, Banbridge and Craigavon Borough the top visitor attractions were Oxford Island National Nature Reserve (220,928 visits), Kinnego Marina (209,027) and Lough Neagh Discovery Centre (133,437). These top attractions are all free to visit. Note the tourism statistics reported top three exclude country parks/parks/forests/gardens, the top visitor numbers for these in the Borough are - Edenvilla Park and Garden (140,074) Tannaghmore Gardens and Rare Breed Animal Farm (139,435) and Peatlands Country Park (126,123). The figures presented are for both fee paying and non fee paying attractions and parks.

Name of Visitor Attraction	2011	2012	2013	2014	2015
Address House	6,900	6,500	7,000	6,889	7,200
Armagh County Museum	12,851	13,099	9,452	10,001	11,147
Armagh Observatory	42,006	42,491	11,000	40,151	44,805
Armagh Planetarium	35,700	41,011	47,706	49,957	48,727
Armagh Public Library	4,403	6,094	7,086	7,713	7,959
Armagh Roman Catholic Cathedral	9,000	9,000	–	–	60,000
Bronte Homeland Interpretive Centre	565	–	–	–	335
Brownlow House	–	–	–	–	15,000
Cardinal Tomas Ó Fiaich Memorial Library and Archive	–	–	10,972	–	5,280
Coney Island	–	–	2,006	2,000	2,000
Craigavon Museum	12,000	13,054	4,500	–	8,465
Dan Winter's House	3,530	3,197	3,925	4,160	3,437
Edenvilla Park and Garden	–	–	–	–	140,074
FE McWilliam Gallery & Studio	43,069	50,466	–	–	42,498
Fergusons Irish Linen	1,844	1,833	1,873	1,654	1,449
Gosford Forest Park	–	–	51,606	58,081	47,051
Kinnego Marina	343,927	158,448	174,365	216,000	209,027
Lough Neagh Discovery Centre	93,105	–	133,004	131,559	133,437
Milford House Collection	900	1,200	1,500	1,200	2,000
Millenium Court Arts Centre	12,072	15,302	16,552	16,602	17,317
No. 5 Vicars' Hill	3,755	3,892	3,755	3,962	3,582
Oxford Island National Nature Reserve	319,079	296,606	314,202	217,353	220,928
Peatlands Park	95,000	100,000	90,000	95,000	126,123
Portmore Lough Nature Reserve	4,560	4,500	10,000	12,000	12,000
Royal Irish Fusiliers Museum	10,218	10,847	11,269	12,630	11,286
Tannaghmore Gardens and Rare Breed Animal Farm	85,000	–	30,686	109,207	139,435
The Argory	32,500	33,500	35,096	36,483	38,000
The Navan Centre and Fort	45,000	45,200	50,792	49,328	44,016
William McCrum Park	–	–	–	–	6,000

Table 6. Visitor attractions and their number of visitors in Armagh City, Banbridge and Craigavon Borough, 2011-2015. Source: NISRA. Some respondents wished their visitor numbers to remain confidential and therefore visitor numbers for these attractions have been excluded from this table. The visitor numbers provided for Gosford Forest Park are for fee paying visitors only. During 2013 the counters for Armagh Observatory failed and therefore visitor numbers for 2013 reflect part of the year only.

Visitor Experience

In order to understand our visitors better and to gain an insight into their needs, it is important to view the Northern Ireland visitor experience from the point of view of our visitors. Visitor attitude surveys on nine key tourism areas (known as Destinations) in Northern Ireland are available from Tourism NI, these can help gain an insight into the various elements of the visitor journey here - from trip planning to participating in leisure activities. Results for 2014 are available for two destinations in the Borough - Armagh and Lough Neagh and surrounding area. In the survey, visitors were asked to choose words to describe the destination.

Armagh, was seen as Friendly (66%), Memorable and Cultural (both 42%).

Compared to all other regions, Lough Neagh was more likely to be seen as Relaxing (78%) and more likely than most other regions to be described as Fun (29%) and Familiar (21%).

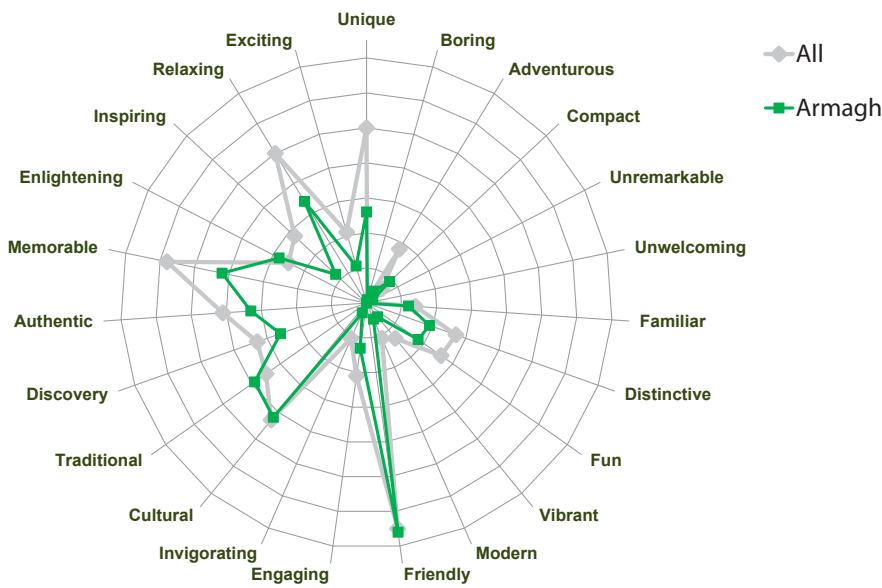


Figure 9. Armagh - words chosen to describe destination. Source: Visitor Attitude Survey, 2014, Tourism NI.

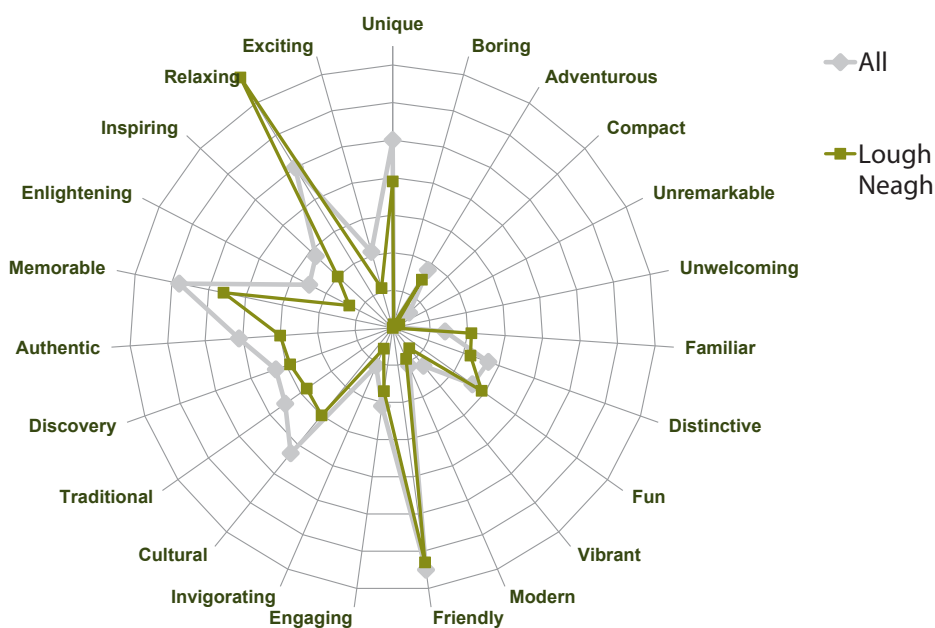


Figure 10. Lough Neagh - words chosen to describe destination. Source: Visitor Attitude Survey, 2014, Tourism NI.

CULTURE AND ARTS

The benefits of the arts are described in the Arts Council Strategy 2013-2018, entitled 'Ambitions for the Arts'. The arts have the power to transform lives, connect people and are essential to a thriving community. They contribute to creating a sense of place and help fuel social and economic growth. The arts create jobs, promote tourism, foster innovation, nurture community development and help build peace in our fractured society. Through them people can develop skills, build interpersonal ties, change attitudes to learning and foster educational development.

Engagement in Culture and Arts

As described in the draft Programme for Government framework 2016, cultural engagement impacts positively on general wellbeing. Cultural participation is known to bring benefits in learning and education; and there is a significant association with cultural engagement and good health and satisfaction with life. Culture is key to our sense of identity as individuals and as communities. Cultural offerings encourage visitors and day-trips, creating and maintaining jobs in cultural tourism, and contribute to the development of creative industries in our economy.

Rates of engagement in culture and arts by adults are available from the Continuous Household Survey. In 2015/16, 85% of adults in Northern Ireland had engaged in arts/cultural activities in the previous 12 months, an increase from 81% in 2007/08. Engagement with culture and arts includes engagement with the arts (attendance or participation), used the public library service, visits to museums and from 2011/12 visits to Public Records Office NI (PRONI).

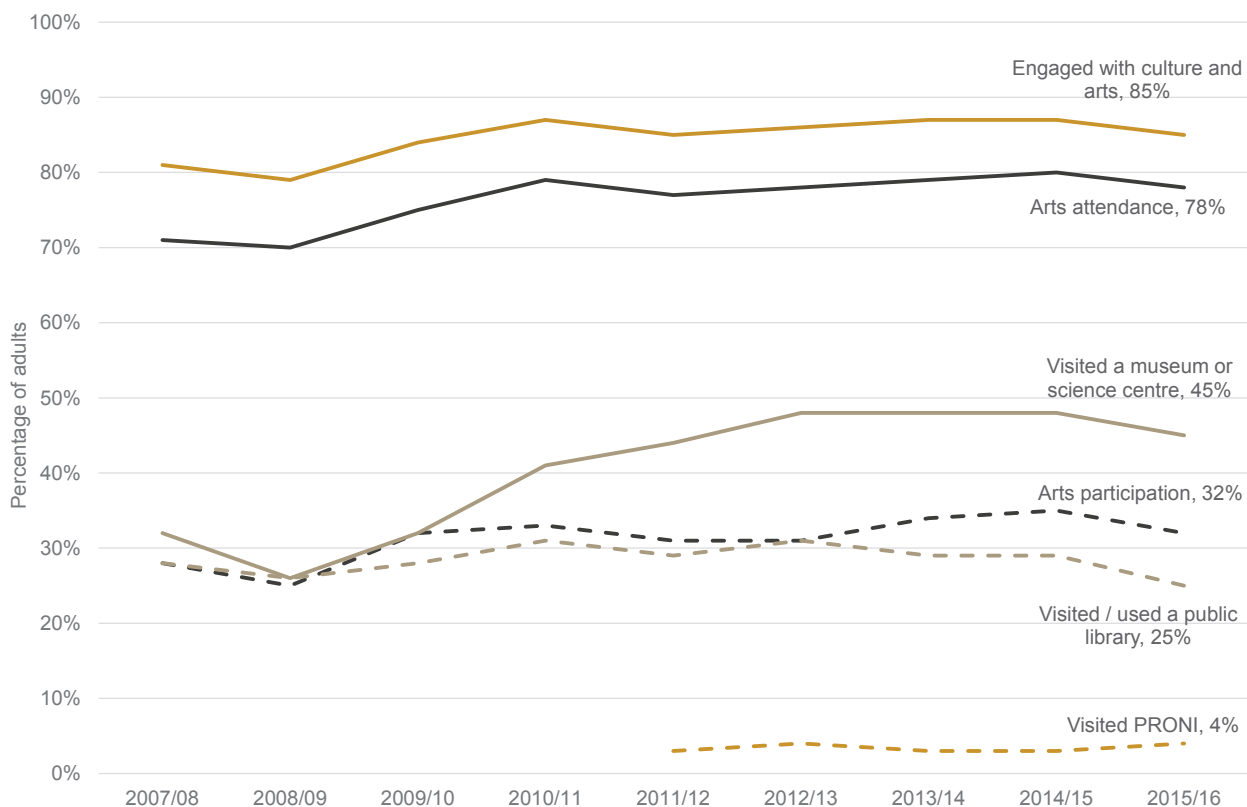


Figure 11. Percentage of adults engaged in culture or arts in previous year (2007/08 - 2015/16). Source: Department for Communities.

Engagement levels in Northern Ireland can be compared for the most deprived areas (20% most deprived super output areas) and least deprived areas (20% least deprived super output areas). In 2015, there was a significant difference in the level of engagement in culture and arts between the most deprived areas (79% of adults) and the least deprived (90% of adults). Lower levels of engagement have been seen in the most deprived areas since 2007/08.

Engagement levels with arts were lower in the most deprived areas (75%) than in the least deprived areas (88%), however engagement rates for both have increased over the long term.

For Libraries, the survey results showed there is not a significant difference in rates of public library usage between adults living in the most or least deprived areas of Northern Ireland.

Adults who live in the most deprived areas of Northern Ireland were less likely (32%) to have visited any museum or science centre than adults living in the least deprived areas (59%). Whilst trend data are available back to 2007/08, it should be noted that these figures are affected by the closure of the Ulster Museum between October 2006 and October 2009. It is, therefore, more appropriate to make comparisons from 2010/11 onwards. There has not been a significant change over the 2010/11-2015/16 time period in the proportions of adults who live in the most deprived areas or adults who live in the least deprived areas, visiting a museum or science centre.

At Local Government District level, the individual rates are available using three years of combined data. Although the overall engagement rate with culture and arts has not yet been released at this level. In the Armagh City, Banbridge and Craigavon Borough in 2011/12-2013/14:

- 77% of adults had attended an arts event (NI 78%) and 34% of adults had participated in arts activities (NI 32%). The NI levels are also for the three year combined period.
- 27% of adults had used the public library service in the previous year, slightly lower than the NI level of 30%.
- Just over two fifths (41%) of adults had visited a museum or science centre, lower than the NI level of 47%.

	Arts attendance (%)	Arts participation (%)	Used the public library service (%)	Visited a museum or science centre (%)
Antrim and Newtownabbey	76	33	27	51
Ards and North Down	84	32	38	67
Armagh City, Banbridge and Craigavon	77	34	27	41
Belfast	78	33	32	53
Causeway Coast and Glens	67	30	21	28
Derry City and Strabane	78	29	34	48
Fermanagh and Omagh	75	29	29	39
Lisburn and Castlereagh	86	38	32	58
Mid and East Antrim	79	36	27	45
Mid Ulster	75	24	28	36
Newry, Mourne and Down	75	30	28	37
Northern Ireland	78	32	30	47

Table 7. Engagement in culture and arts by adults, Local Government Districts, 2011/12 – 2013/14. Source: Department for Communities.

Factors that Influence Engagement in Culture

Respondents in the Northern Ireland Omnibus Survey (February 2011) were asked a series of questions about factors that had influenced them and would encourage them to engage in the arts. They were also asked a series of questions on the factors that would make it less likely that they would visit a museum or library.

Factors influencing people to engage in the arts

Respondents were asked about the factors that have influenced them to engage in the arts and the factors that would encourage them to engage more in the arts. The main factors that influenced respondents to engage in the arts in the last year were that people found it enjoyable (71%) and that they attended to see a specific show (41%). When asked what would influence them to engage in the arts in the future, most respondents answered lower cost of activities/performances (36%), followed by more access to good arts venues. Almost one fifth (19%) said nothing would encourage them to engage more as they had no intention of engaging in the arts.

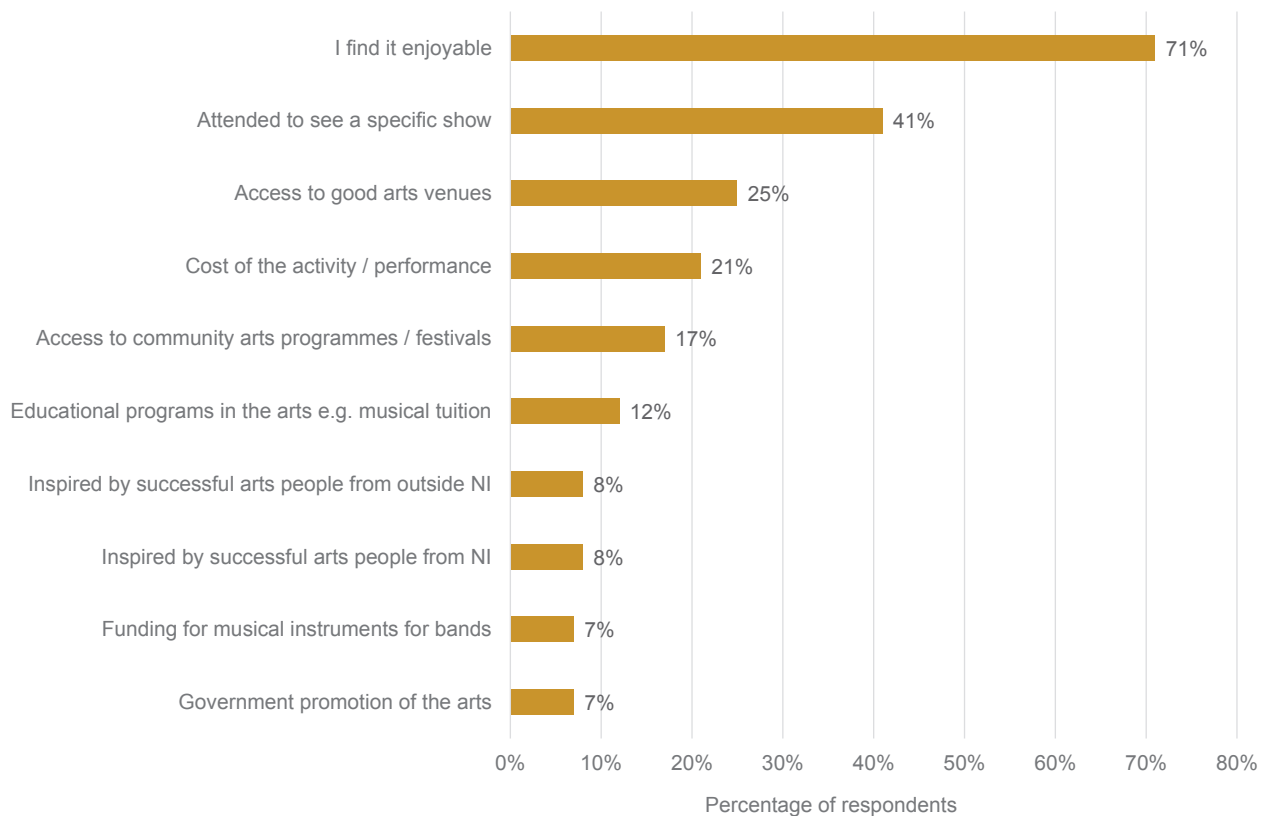


Figure 12. Factors influencing people to engage in the arts, Northern Ireland Omnibus Survey 2011. Source: NISRA.

Factors influencing people to attend museums

One of the main factors that would make it less likely that a respondent would visit a museum or science centre is in relation to cost, an increase in admission cost in museums that are not free was chosen by 37% of respondents. Poorly maintained buildings (35%) was the second highest factor that would make it less likely that respondents would visit a museum. Factors around programmes and activities were also mentioned by around three in ten respondents. A third of respondents (33%) said that a decline in the quality of events, exhibitions and programmes would make it less likely that they would visit a museum. In contrast, 17% said they had no intention of attending a museum or science centre.

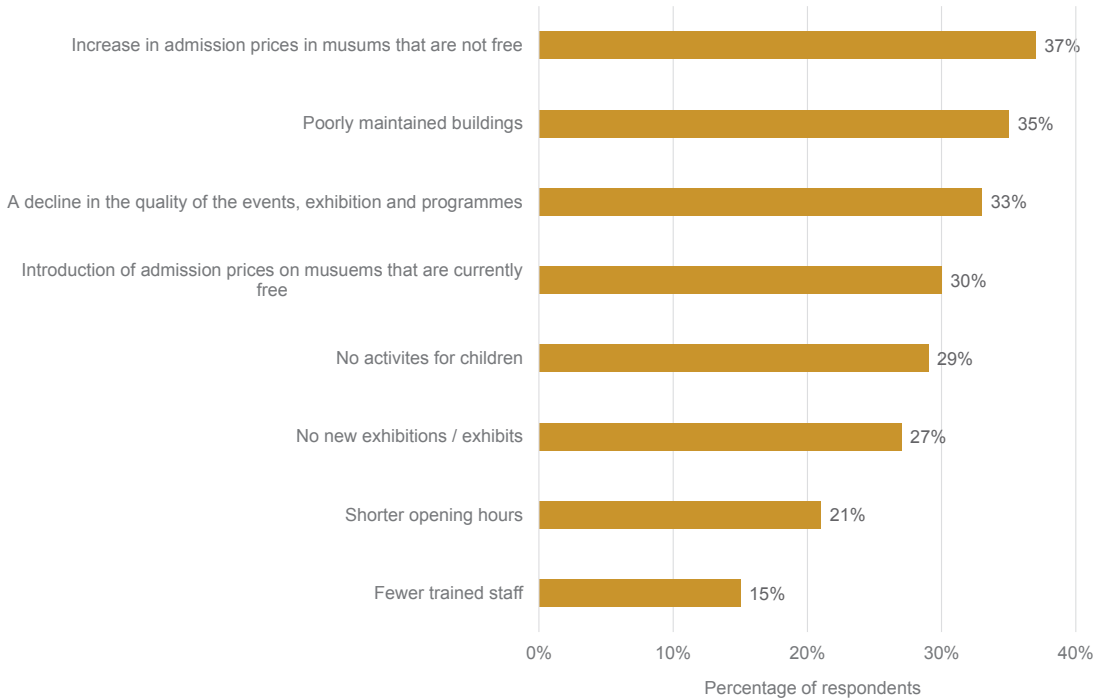


Figure 13. Factors that would make it less likely respondents would attend a museum, Northern Ireland Omnibus Survey 2011. Source: NISRA.

Factors influencing people to attend libraries

Respondents were asked what would make it less likely that they would attend a library. The top three responses were closure of their local library (44%), fewer new books (35%) and shorter opening hours (27%). Just over one in five respondents (21%) said they had no intention of attending a library.

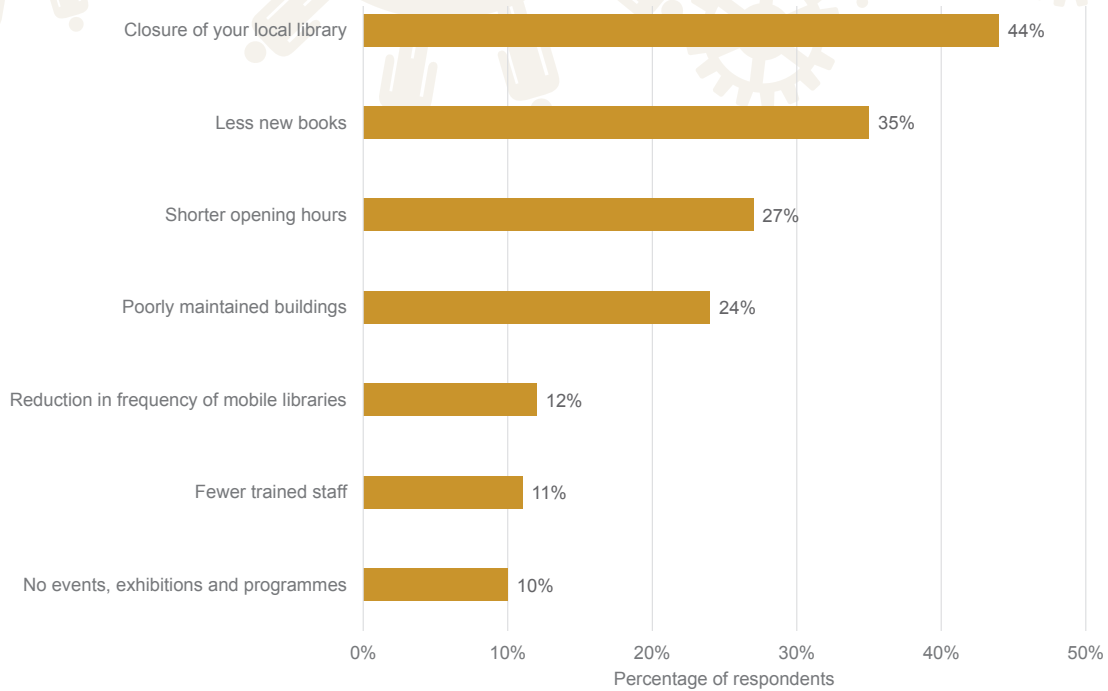


Figure 14. Factors that would make it less likely respondents would attend a library, Northern Ireland Omnibus Survey 2011. Source: NISRA.

Cultural Deprivation Index

The previous Department of Culture, Arts and Leisure commissioned research on Cultural Deprivation within Northern Ireland. In response to this request NISRA developed a Cultural Deprivation Index (CDI) published in 2014. It was based on proximity to cultural facilities (sports, arts, libraries and museums). As well as an overall CDI, individual indices for each of the facility types are available. While the report was released in 2014 the list of facilities the indices are based on were from 2012.

The CDI highlights the urban and rural differences in the proximity to culture, arts and leisure services. The 20% most deprived areas are generally rural, 171 of the 178 super output areas (SOAs) in the top 20% in Northern Ireland are rural. In contrast, there are no rural SOAs in the 40% least deprived areas.

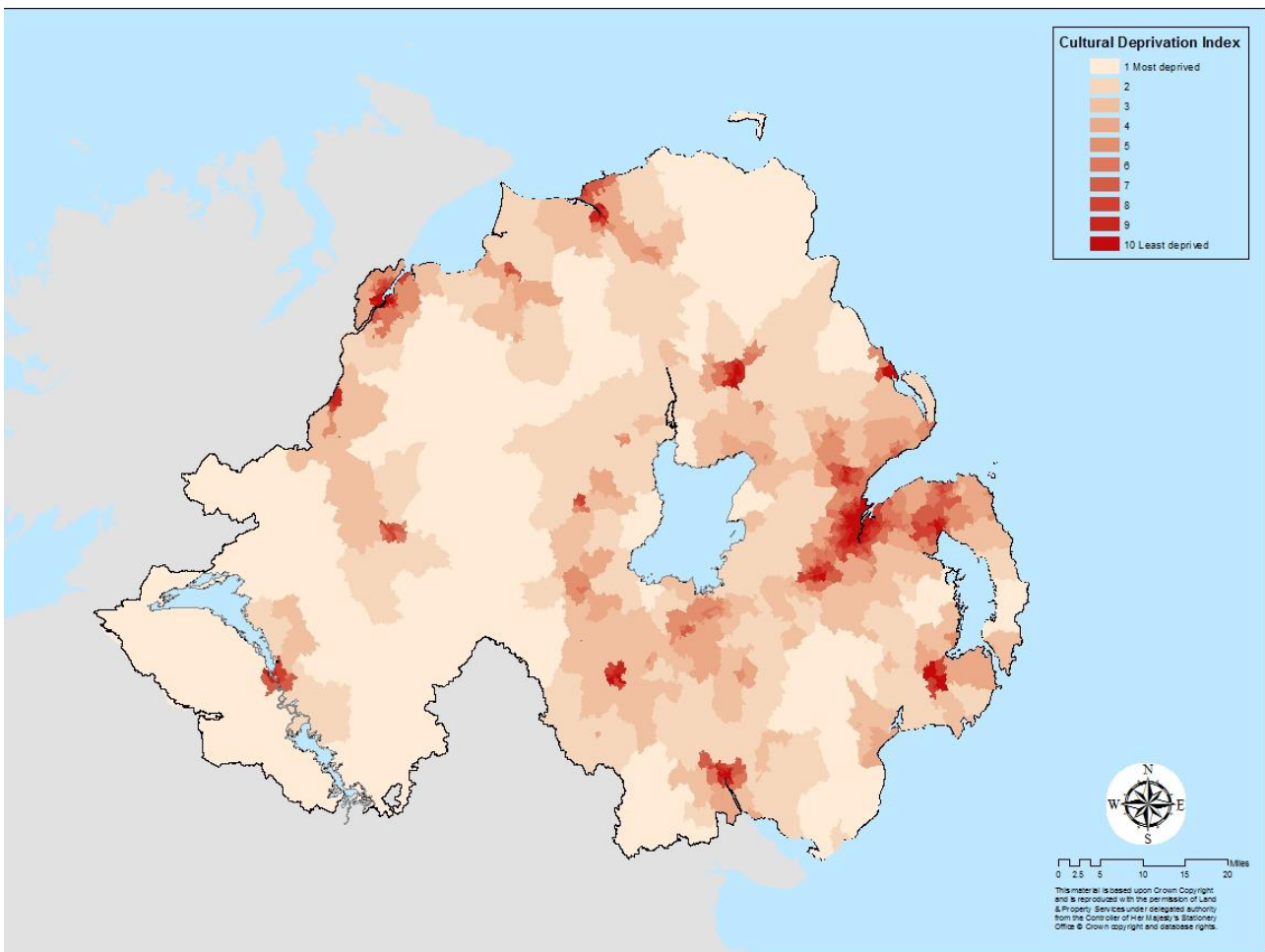


Figure 15. Cultural Deprivation Index, 2014. Source: NISRA.

The ten most deprived super output areas in the Borough on the Arts, Library and Museum deprivation indices are shown below, with their rank out of all 890 super output areas in Northern Ireland.

SOA Name	Arts Deprivation Index rank	SOA Name	Library Deprivation Index rank	SOA Name	Museum Deprivation Index rank
Katesbridge	40	The Birches 2	32	Gransha	106
Gransha	42	Killylea	40	Rathfriland	109
Bannside	57	Markethill	53	Derrynoose	114
Quilly	58	Gransha	72	Laurelvale	133
Donaghcloney 2	69	Derrytrasna 2	84	Katesbridge	141
Ballydown 2	75	Donaghcloney 2	88	Dromore North	146
Dromore South 2	77	Loughgall	89	Dromore South 2	152
Ballydown 1	79	Katesbridge	96	Killylea	158
Dromore South 1	81	Poyntz Pass	97	Carrigatuke	161
The Cut	88	Killeen	112	Tandragee	166

Table 8. Top 10 most deprived super output areas in Armagh City, Banbridge and Craigavon on cultural deprivation indices, 2014. Source: NISRA.

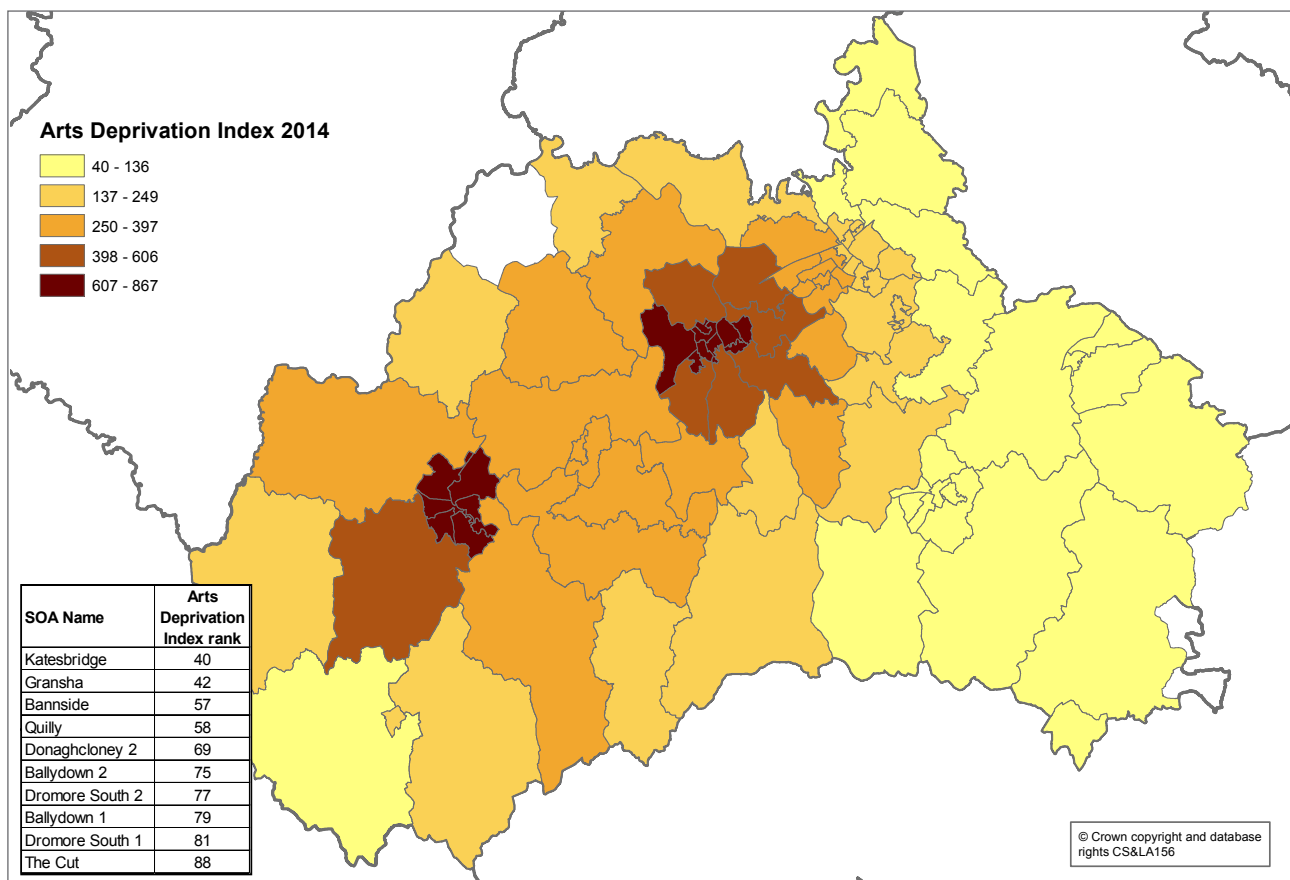


Figure 16. Arts deprivation index, 2014. Super output areas in Armagh City, Banbridge and Craigavon with rank out of all NI super output areas, 1 most deprived, 890 least deprived. Source: NISRA.

Method

The calculation of the cultural deprivation index follows a similar methodology to that used in the Proximity to Services domain of the Multiple Deprivation Measure. It involves producing scores for each output area (OA) for each of four cultural facility types: sports, arts, libraries and museums. The scores at OA level are based on the average distance to the nearest facility. A combined score, the Cultural Deprivation Index (CDI), is then produced for each OA. The OA level scores are used to produce scores for each Super Output Area (SOA). These SOA scores are then ranked from 1 to 890, where rank 1 is the most deprived SOA with regard to proximity of cultural facilities, while rank 890 is the least deprived.

The Cultural Deprivation Index 2014 was published in February 2014, although the list of facilities the indices are based on are from 2012.

- **Arts facilities:** All venues with either combined or dedicated arts facilities, including auditoria, studio space, rehearsal space and gallery provision. Smaller scale arts venues or multi-purpose facilities that may be used to facilitate arts related activity were excluded. The list of venues was provided by Arts Council Northern Ireland.
- **Libraries:** All static libraries. Mobile library stops were excluded (A review of mobile library stops was ongoing while the indices were being developed and thus it was decided to exclude them at that stage). The list of static libraries was provided by Libraries NI.
- **Museums:** Four National Museums and all local museums accredited by the Museum Accreditation Scheme. The list of accredited museums was held by DCAL. W5 was also included.

Participation in culture and arts in Northern Ireland was examined in relation to proximity to facilities using the index. For the arts, attendance at the arts is lower in the most deprived decile of the Arts Deprivation Index than for the other nine deciles collectively. Use of the public library service does increase as the proximity to a library increases, with the most deprived SOAs in the Library Deprivation Index having a lower usage rate than the least deprived SOAs. Similarly, those in the most deprived SOAs for the Museum Deprivation Index are less likely to have visited a museum than those in the least deprived SOAs. However, examination of the overall engagement in culture, arts and leisure against the CDI shows no relationship between participation and proximity to facilities.

Libraries

Libraries NI and the then Department of Culture, Arts and Leisure (DCAL) mapped the library service in Northern Ireland in 2014. The aim of the project was to look at static libraries and mobile library stops following on from the review of Delivering Tomorrow's Libraries and the development and implementation of a new mobile library strategy. The research aimed to calculate the number of households living within 2 miles of a library or mobile library stop and map the new library service against deprivation, neighbourhood renewal areas and urban/rural areas.

The research compared 2012 and 2014 and found that Libraries NI's development and implementation of a new mobile library strategy has improved proximity to the library service in Northern Ireland in areas of deprivation, neighbourhood renewal areas and rural areas.

In 2014, 89% of households in Northern Ireland lived within 2 miles of the library service. There are 98 libraries in Northern Ireland, 11 of these are located in Armagh City, Banbridge and Craigavon Borough. In addition, in 2014 there were 55 mobile library stops in the Borough.

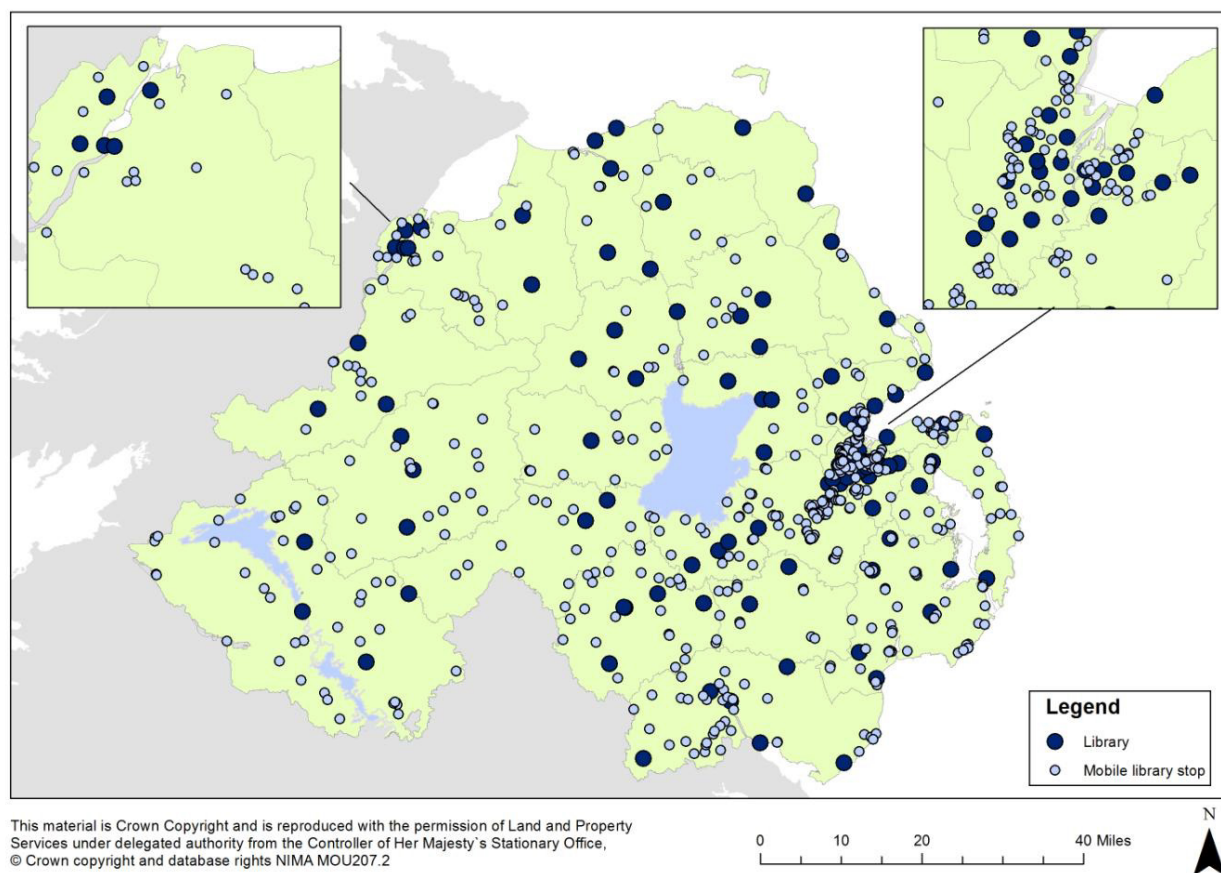


Figure 17. Location of static libraries and mobile library stops in Northern Ireland, 2014. Source: NISRA, DCAL and Libraries NI.

	Static library	Mobile library stop
Antrim and Newtownabbey	8	20
Ards and North Down	6	39
Armagh City, Banbridge and Craigavon	11	55
Belfast	17	65
Causeway Coast and Glens	10	16
Derry City and Strabane	8	31
Fermanagh and Omagh	6	59
Lisburn City and Castlereagh	5	65
Mid and East Antrim	9	16
Mid-Ulster	7	34
Newry City, Mourne and Down	11	84
Total	98	484

Table 9. Location of static and mobile libraries in Northern Ireland, 2014. Source: NISRA, DCAL and Libraries NI

Research on engagement in culture and arts for 2011/12 to 2013/14 published by DCAL in 2015 showed that 27% of adults in Armagh City, Banbridge and Craigavon Borough used the public library service in the previous year, a lower proportion than in the rest of Northern Ireland as a whole and NI overall (30%).

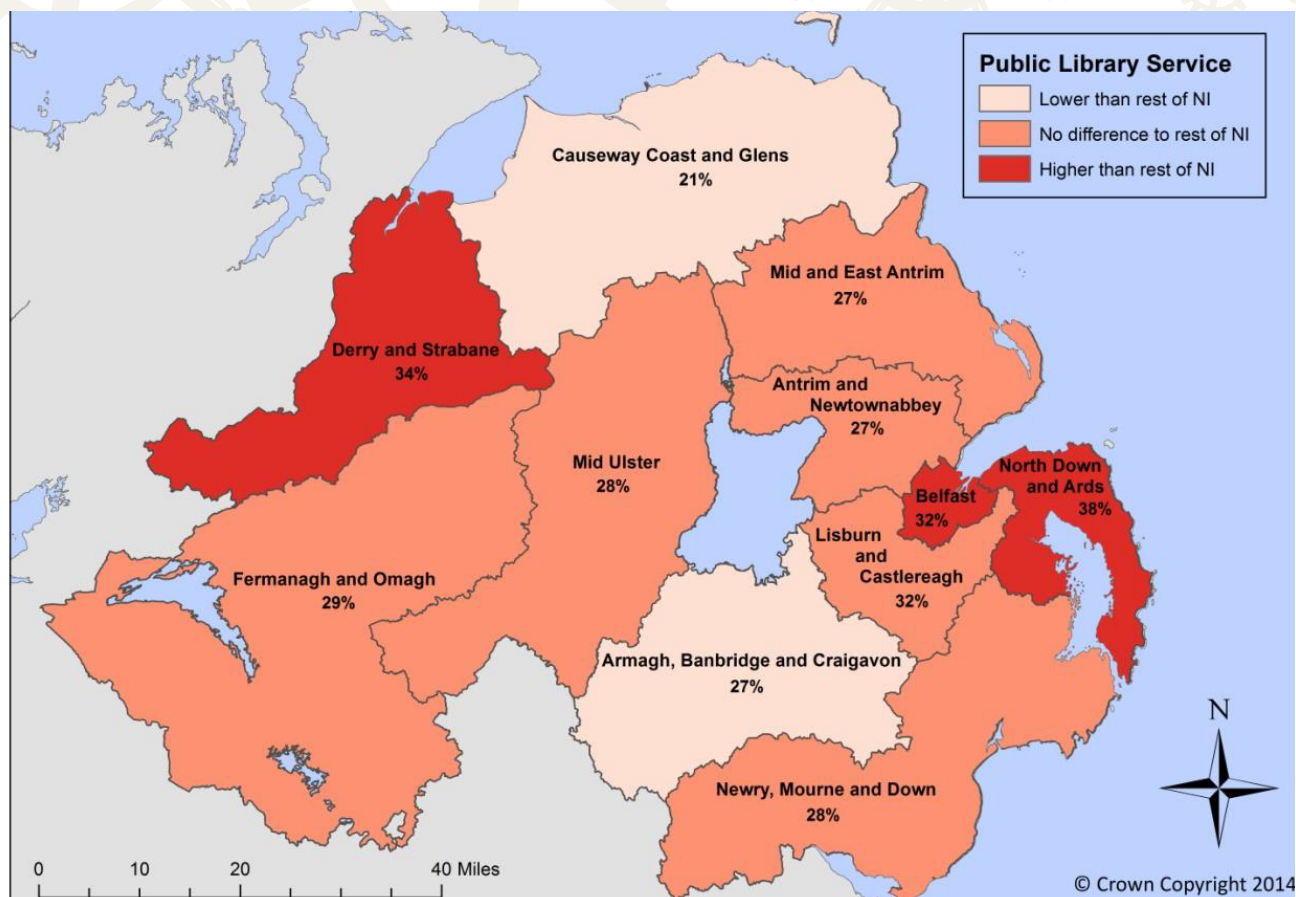


Figure 18. Engagement in Public Library Service, percentage who has used the public library service in the previous year, 2011/12 – 2013/14. Source: DCAL.

DCAL's public libraries policy, 'Delivering Tomorrow's Libraries' (DTL) was published in 2006 and reviewed in 2012 and 2013. As part of this, a number of Public Library Standards (key performance indicators) are monitored.

Use of libraries by adults in Northern Ireland (using results from the Continuous Household Survey 2014/15):

- In 2014/15, just under three in every ten adults (29%) had used the public library service at least once within the last 12 months. This figure showed no change on the 2013/14 figure (29%).
- More than two-thirds of adult public library service users (68%) cited the traditional library use of 'Borrowing / returning and renewing books' as the main reason for using the public library service in the last year.
- The proportions of adults living in the most deprived areas and adults living in the least deprived areas who had used the public library service were similar (28% and 32% respectively).
- Nearly nine out of every ten library users (89%) were satisfied with public library provision in Northern Ireland, while only 3% stated that they were dissatisfied.
- The proportions of library users living in the most deprived areas and adults living in the least deprived areas who were satisfied with public library provision were similar (89% and 87% respectively).

Use of libraries by young people in Northern Ireland (Using results from the Young Persons' Behaviour and Attitudes Survey 2013):

- In 2013, almost three-fifths (57%) of young people had used the public library service at least once in the last 12 months.

- The main reasons given for using the public library service were 'To borrow/bring back or renew books' (63%), followed by 'To do homework or study' (36%).
- There was no difference in the proportion of young people who are entitled to free school meals and those who are not entitled free school meals who used the public library service (56% and 57% respectively).
- Two-thirds (66%) of young people who used the public library service in 2013 were satisfied with public library provision.
- A lower proportion of young library users who are entitled to free school meals (59%) were satisfied with public library provision than those who are not entitled to free school meals (69%).

Libraries NI provides a number of core and regular activities in the majority of its 96 branch libraries as part of its programmes to promote reading, learning and access to culture, heritage and information. Core activities are defined as Class Visits, Got IT?, Reading Groups, Rhythm and Rhyme and Storytime, while regular activities are defined as Genealogy, Go ON!, Job Clubs and Knit and Natter Groups. The numbers of participants in the activities are currently available at NI level only.

Museums

Museums provide important services to local residents and visitors. In Armagh City, Banbridge and Craigavon Borough Council, there are four accredited museums owned and managed by Council:

- F. E. McWilliam Gallery and Studio - a state of the art facility, which features a permanent display of McWilliam's sculpture, temporary exhibitions of Irish and international art, a sculpture garden, a craft shop, Quails café and a visitor information point.
- Craigavon Museum Services - are responsible for a number of facilities: Moneypenny's Lockhouse, The Enterprize Barge, The Barn Museum (an accredited museum in its own right), Philip B Wilson Library, World War II Defence Pillbox and Collections.
- Barn Museum – Located at Tannaghmore Gardens, this converted 18th century Historic Barn contains exhibition rooms depicting the 19th/20th Century social, domestic, schooling, working and farm life of rural County Armagh.
- Armagh County Museum - The collections of Armagh County Museum are estimated at 350,000 items, concentrating on County Armagh, its people, built heritage and landscape.

Independent accredited museums in the Borough include Armagh Public Library, Milford House Museum and the Royal Irish Fusiliers Museum, plus two accredited National Trust museums: The Argory and Address House.

Accreditation is a national quality standard for museums. It helps museums to develop their resilience through effective forward planning, to deliver expected high standards of collections management and to be responsive to user needs and expectations. There are 42 accredited museums in Northern Ireland.

As well as museums, history and pre-history is also interpreted at the Navan Centre in Armagh and through the Armagh Living History events and guided activities. In the Banbridge area, Drumballyrone Church and School is a facility which tells the story of the Brontë family.

Craigavon Museum Services offer curriculum linked outreach programmes that can be delivered in the classroom. Each programme is supported by the provision of a variety of original and replica artefact to encourage 'hands on' learning, covering themes including: Toys and Games, World War 1 and 2, The Archaeology of Early Settlers. A selection of themed loan boxes is available classroom use, reminiscence projects, residential homes and community groups.

The Arts

The arts are delivered across the Armagh City, Banbridge and Craigavon Borough in a variety of forms. At the heart of each of the programmes is the engagement of local people and visitors in creative, artistic and cultural experiences either as participant or audience member.

Armagh

The Market Place Theatre and Arts Centre aims to provide a wide range of services in its role as an arts, entertainment and conference centre. The Market Place provides a home and focus for the arts at the heart of the community, offering high quality performances, exhibitions, education and participation opportunities by delivering a wide range of arts, craft and cultural activities. The programme is designed to challenge, engage, entertain and educate. The Market Place is an important driver in the economic life of Armagh city centre providing a focus for the night time economy throughout the year. It is also a key cultural asset for the council area and beyond, drawing audiences from a wide radius. The building comprises a 393 seat auditorium, 100 seat studio, Visual Art Gallery, two workshop rooms and one meeting room. It has all the backstage and administration facilities and high specification equipment required by a contemporary arts, entertainment and conference facility. In 2015-2016 it sold 45,808 tickets for 219 performances, there were 706 attendances at workshops and its facilities were used by 72,046 visitors.

Armagh hosts and facilitates a number of festivals and events that have arts and craft at their heart. These include; St Patrick's Festival, Georgian Day, Culture Night, Armagh Craft Fair, John Hewitt International Summer School, William Kennedy Piping Festival, Charles Wood Summer School and Bard of Armagh.

Banbridge

There are a wide and varied programme of activities throughout the year in the Banbridge area, to encourage the local community to take part in artistic activity. Arts Development projects commission professional artists to work with schools, community groups, specific targeted groups, e.g. the older community and young people and the wider community to address issues, enhance well-being, enrich lives and increase participation in all aspects of the arts. In addition to the range of community outreach projects delivered by Council a programme of events is also delivered.

Buskfest is a signature music event in Banbridge, attracting over 10,000 visitors to the town centre. Other events include St Patrick's Day, Outdoor Theatre and Outdoor Cinema, Arts Fest, Craft Fair and Christmas Lights switch on.

The annual craft fair features 40-50 participating exhibitors from across Ireland and attracts 1,000-1,300 visitors.

Banbridge District Arts Committee, a constituted group containing a selection of artists from across the legacy district, receives £17,000 funding annually from the Council. The Committee assists in the organisation of events including Easter and Summer Activity Programmes, Arts Fest and Craft Fair and has been assisting the Council with the development of the arts for over 20 years.

The Council manages two venues in Banbridge; the F.E. McWilliam Gallery is an award winning gallery that hosts exhibitions from artists across the world. The Bronte Music Club is funded by the Council and is contracted out annually to be run by an individual / organization.

Craigavon

Craigavon has a dedicated arts development service whose remit is to give everyone in the area the opportunity to be involved in the arts and creativity. It offers a range of programmes across Craigavon in urban and rural areas and harnesses the creativity of local and international artists to develop innovative and exciting projects in local communities.

The service engages the community in the delivery of two arts driven events; the Halloween @ Rushmere event is delivered annually and the outdoor arts festival 'Good Life' is delivered bi-annually, most recently held at Oxford Island in March 2016.

Both events have associated community engagement programmes that build in ownership within the community.

The Arts Service engages in partnerships with community organisations and charities to deliver locally relevant arts projects that deliver on needs and opportunities identified through consultation and collaboration.

The Millennium Court Arts Centre delivers a programme of visual art exhibitions and associated activity. The centre was developed in 1999 with the support of the Council and Arts Council Lottery. The Council continues to be a major funder with the centre delivering on a Service Level Agreement aligned to the corporate plan.

The Arts Development Service based in Craigavon also manages the Artspace at Oxford Island and the Blacksmithing Workshop at Money Penny's Lock.

Volunteering In Culture And Arts

The Continuous Household Survey 2013/14 provides findings on volunteering in culture and arts (including volunteering in museums or libraries) by adults in Northern Ireland.

Just over one in ten adults (11%) had volunteered in culture and arts within the last year. Younger adults aged 16-24 years (17%) were more likely than any other age group to have volunteered

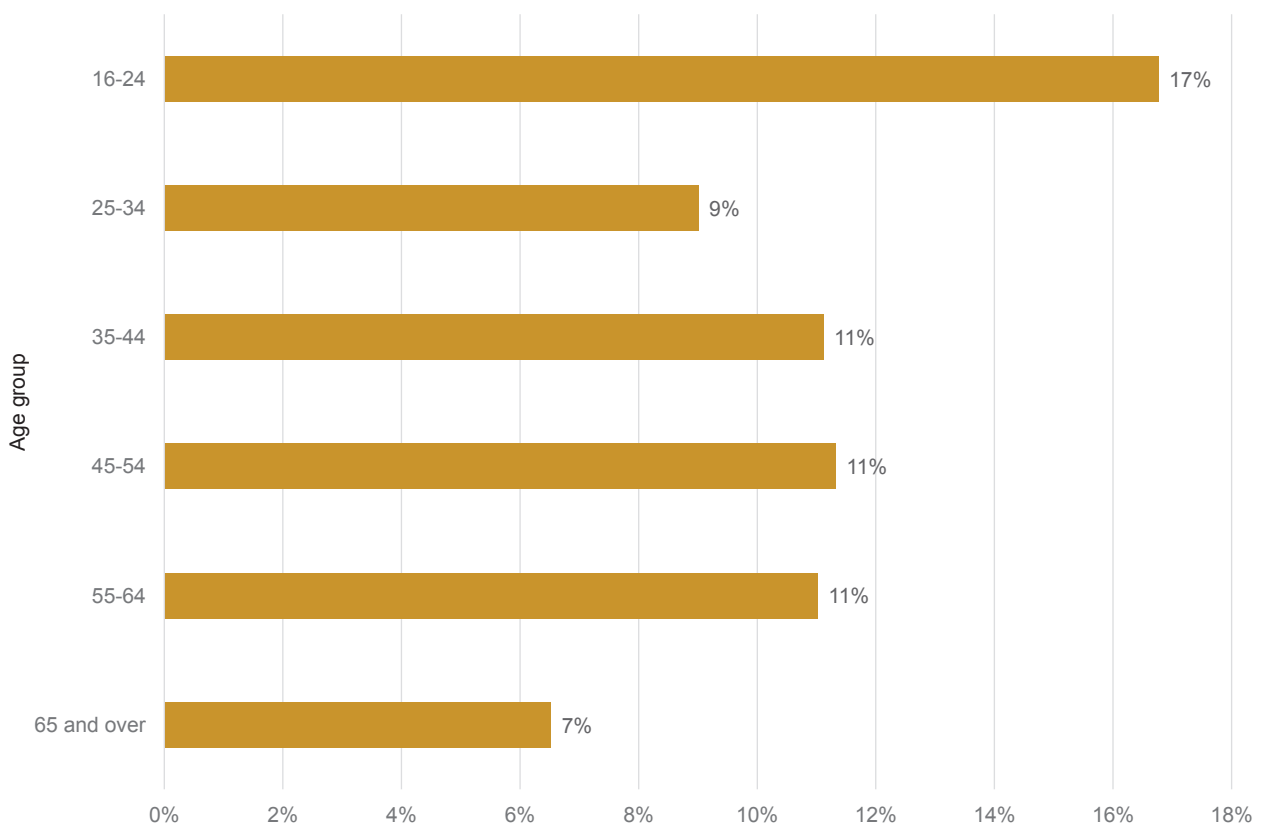


Figure 19. Volunteering in culture and arts within the last year by age, Northern Ireland, 2013/14. Source: NISRA.

Fundraising (41%), teaching (21%) and event management (20%) were the three most frequently cited volunteering roles carried out.

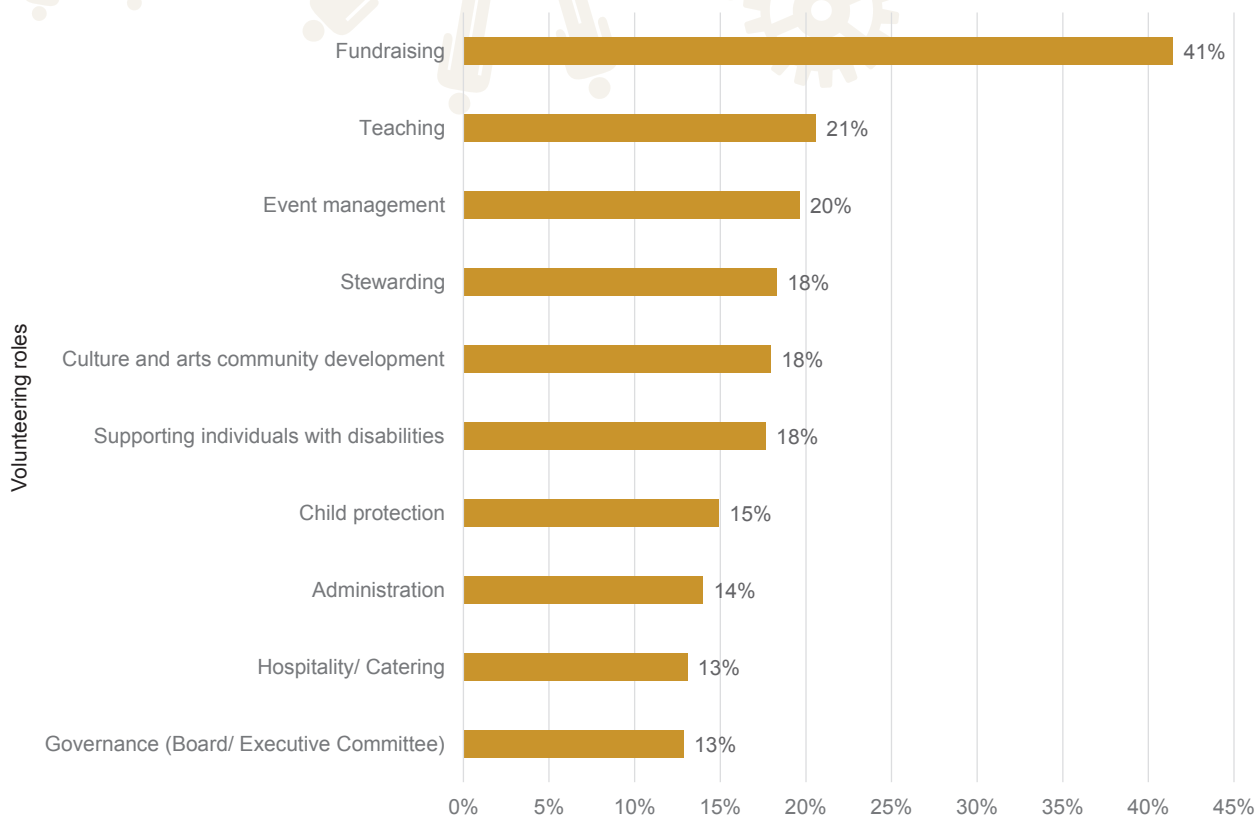


Figure 20. Top ten culture and arts volunteering roles, Northern Ireland, 2013/14. Source: NISRA.

Family and friends that were already involved (49%), voluntary and community sector organisations (22%) and church/ faith based groups (22%) were the most likely ways volunteers had found out about volunteering in culture and arts.

Over four-fifths of culture and arts volunteers (83%) stated that having fun/ enjoyment was a benefit of volunteering in culture and arts, while over three-fifths (63%) stated that a benefit was meeting people from different backgrounds.

Less than one in every twenty adults (4%) had ever volunteered at a major culture or arts event.

The most frequently cited factor that could encourage adults to volunteer at a major culture or arts event was an opportunity to meet new friends (20%). This was followed by “if it didn’t take too much time“ (19%) and “an opportunity to develop new skills” (18%).

Arts And Culture Expenditure

Local Authority

The Local Authority Arts and Culture Expenditure Survey for 2013/14 published in 2015 by the Arts Council, presents information on the financial contribution that local councils make to the arts in Northern Ireland based on services provided to ratepayers. The analysis provides an overview of trends between 2006/07 and 2013/14 as they relate to audited income and expenditure under the culture and related services sub-division of local council's accounting system. Information is sourced from the then Department of the Environment and presented for the 26 legacy districts, the report also projected the results by the new 11 council areas.

In 2013/14, culture and related services expenditure for all of Northern Ireland was £50.3m, or an average spend by the 11 councils of £4.57m. This spend equated to £27.48 per head of the NI population. Note - Derry/Londonderry was City of Culture in 2013. Expenditure in Armagh City, Banbridge and Craigavon was estimated to be £2.63m or £12.82 per head of local population, the second lowest per head spend for all councils.

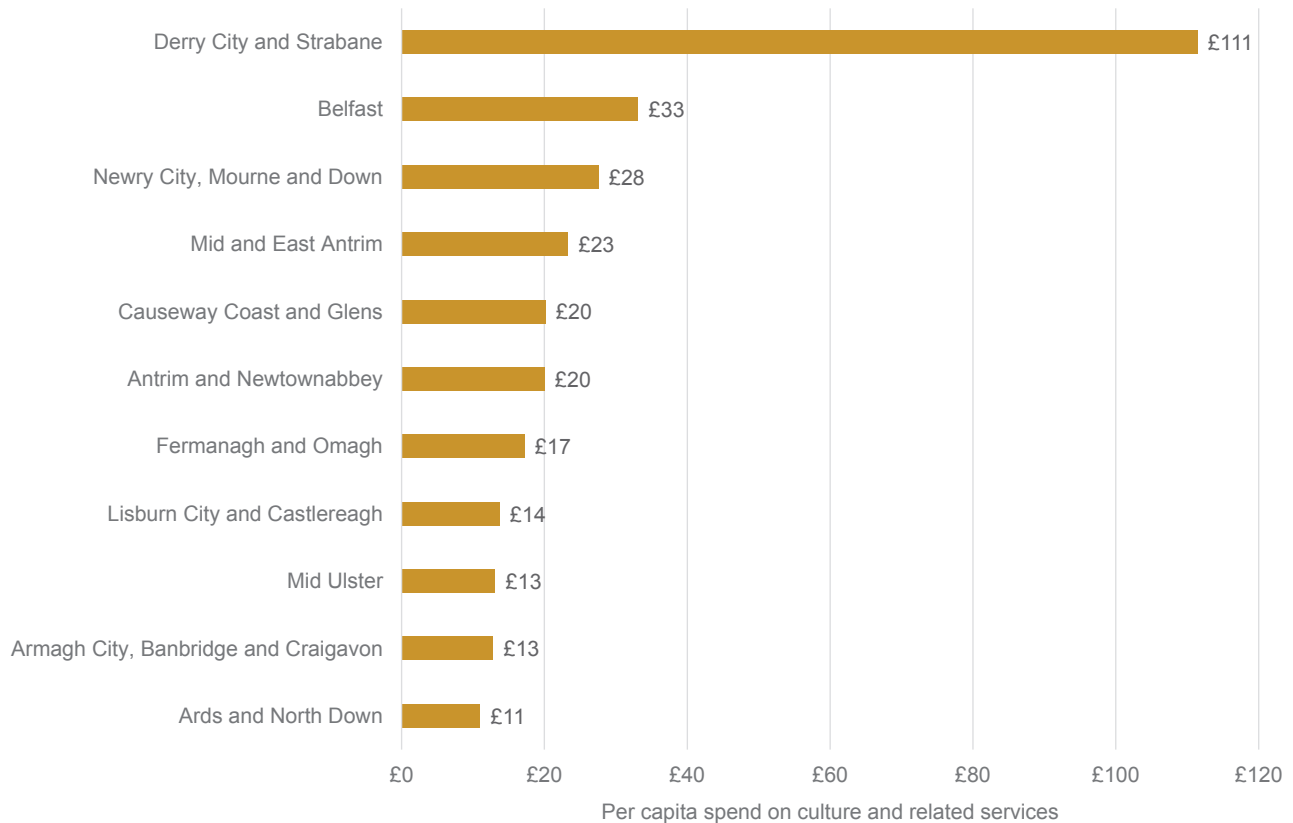


Figure 21. Per capita spend on culture and related services, estimated for new 11 Local Government Districts, 2013/14. Source: Arts Council Local Authority Expenditure Survey. Note - Derry/Londonderry was City of Culture in 2013.

	Gross expenditure on culture and related services (£m)	Per capita expenditure on culture and related services (£)
Antrim and Newtownabbey	2.79	20.00
Ards and North Down	1.74	11.01
Armagh City, Banbridge and Craigavon	2.63	12.82
Belfast	9.33	33.12
Causeway Coast and Glens	2.86	20.15
Derry City and Strabane	16.57	111.47
Fermanagh and Omagh	1.97	17.23
Lisburn City and Castlereagh	2.61	13.72
Mid and East Antrim	3.17	23.31
Mid-Ulster	1.87	13.12
Newry City, Mourne and Down	4.75	27.56
Total	50.28	27.48
Average	4.57	-

Table 10. Gross and per capita spend on culture and related services, estimated for new 11 Local Government Districts, 2013/14. Source: Arts Council Local Authority Expenditure Survey. Note - Derry/Londonderry was City of Culture in 2013.

Arts Council

The Arts Council is the development agency for the arts in Northern Ireland, providing funding for organisations through Exchequer and Lottery funds. Its Annual Funding Programme supports Northern Ireland's arts infrastructure through grants to organisations to meet core and programming costs.

Results from the 2015/16 annual survey of 110 organisations show that, as a result of funding, 31 organisations delivered arts based activity in the Armagh City, Banbridge and Craigavon Borough Council area. This comprised an estimated 1,108 activities, incorporating performances, visual art exhibitions and participation based events. The majority of activities (81%) were delivered by medium sized organisations (defined as having total income of £250,000 to £750,000). Most of the activities delivered in the Borough involved a combination of art forms (37%), followed by traditional arts (28%) and visual arts (18%).

