

Arts Council of Northern Ireland

# **22/23 Annual Funding Survey Findings**

**A summary of findings from a survey of  
core funded arts organisations**

26<sup>th</sup> October 2023



## Table of Contents

1	Summary .....	3
2	Background .....	4
3	About the 22/23 portfolio.....	5
4	Workforce .....	6
4.1	Gender .....	6
4.2	Age .....	7
4.3	Disability.....	7
4.4	Ethnicity .....	8
4.5	Boards .....	8
4.6	Volunteering .....	9
5	Finances .....	10
5.1	Earned income .....	10
5.2	Public sector income .....	10
5.3	Core costs.....	11
5.4	Programming costs .....	11
6	Organisation Activity.....	13
6.1	Engagement .....	13
6.2	Online products.....	14
6.3	Audience accessibility measures.....	15
6.4	Cross-sector engagement .....	16
6.5	Engagement with creatives / practitioners outside Northern Ireland .....	17
6.6	Implications of the UK leaving the EU.....	18

Several key output tables have been developed in Excel format to compliment this analysis. They can be found on the [Resources](#) page of the Arts Council website.

# 1 Summary

The 2022/23 Annual Funding Survey was completed by 95 organisations, representing a 100% response rate. Funded organisations received £14.7m from both Lottery and Exchequer sources. The 33 organisations classified under Combined Arts received the largest share of funding, equating to £5.4m

Overall, workforce levels were back to pre-Covid levels, having grown by 29% in 2022/23. Most of this increase can be attributed to growth in contract employment, particularly in part-time positions. Employment in permanent positions showed more modest gains and remains below pre-Covid levels.

Overall, there are small increases in the proportion of minority ethnic representation within the workforce. The proportion of the workforce describing themselves as disabled fell by 1%. The representation of women in permanent management role remains high, at 60%. There continues to be high levels of 'unknown data' which makes it difficult to determine accurately the diversity of the sector in terms of gender, sexuality, and ethnicity.

Volunteering levels increased by 11% compared to the previous year, with each volunteer contributing, on average 26 hours of their time. Anecdotal evidence suggests that volunteers are taking on positions previously held by paid staff to keep organisations operational.

In terms of finances, income from earned sources grew by 72% in 2022/23, driven largely by box-office and bar catering sales. Although positive, this increase was driven by large scale venues. These organisations saw their box-office income increase by £6m compared to the previous year. In contrast, small scale organisations had to rely more heavily on public sources to sustain their income.

Public sector income grew by 4%, compared to the previous year, with income from trusts and foundations increasing by 20%. Income from 'other' UK public sources fell by 14% compared to the previous year. This is likely to reflect the closure of schemes designed to support organisations during the pandemic.

Income from European funding sources, including Creative Europe and Erasmus continue to decline as legacy projects funded beyond the UK's exit from the EU come to an end.

Cost pressures on core funded organisations continue to grow. Overall, core costs are 43% higher than pre-pandemic levels, with salary costs having risen by 50% to £23.4m. Programming costs show similar pressures with 'travel, accommodation and subsistence' 133% higher than the previous year. There is evidence of organisations attempting to off-set growing cost pressures by reducing expenditure on 'equipment and materials' and 'premium costs'.

Survey findings show that face-to-face engagement levels (in the form of physical performances, participation, exhibitions, and cinema screenings) continue to recover post-Covid, although the number of performances and audiences remain lower than pre-Covid levels.

In contrast to the growth in physical activity, the development of on-line products has slowed, with 38% fewer organisations investing in this area compared to the previous year. Income from this source now represents less than 1% of total earned income.

Despite most organisations employing a range of disability accessibility measures, evidence suggests their ability to continue investing in access, particularly communication-based support has been compromised by increasing costs. For example, the number of organisations providing captioning support in 2021/22 reduced by 25% compared to the previous year.

There remain a range of direct and indirect consequences for core funded organisations because of leaving the EU. These include the loss of professional skills development opportunities and reduced opportunities to showcase talent internationally.

## 2 Background

The Arts Council is the main support for artists and arts organisations in Northern Ireland, distributing Exchequer and National Lottery funding.

The Annual Funding Programme (AFP) is the largest single investment made by ACNI each year and is awarded to key arts organisations working across a range of art forms and practices.

These organisations play a major role in helping us achieve our ambitions set out in our Five-Year Plan: [Inspire, Connect, Lead \(2019 to 2024\)](#).

Organisations in receipt of funding from the Annual Funding Programme (AFP) complete an annual survey detailing information on their finances, workforce composition and activity. This report provides a summary of the 2022/23 findings.

Several key output tables have been developed in Excel format to compliment this analysis. They can be found on the [Resources](#) page of the Arts Council website.

The 2022/23 survey was hosted online by Savanta, an independent survey design research company and achieved a 100% response rate.

In several instances, it has been necessary to exclude extreme responses to ensure trends displayed are an accurate reflection of the portfolio. Referred to as outliers, these figures have been removed as they obscure patterns and trends in the data.

In this report findings are presented at three levels: overall, primary artform (the main area of activity associated with each organisation) and size (a key variable that helps us compare outputs based on an organisations overall income).<sup>1</sup>

The main changes to this year's survey were:

1. To the gender, ethnicity, sexual orientation response classifications to make them easily understandable and consistent with current best practice.
2. The removal of questions relating to immediate impact of COVID on operations.
3. The addition of questions relating to international working and leaving the EU.

---

<sup>1</sup> The classifications are small (less than £200,000), medium (between £200,000 and £800,000), and large (over £800,000).

### 3 About the 22/23 portfolio

Ninety-five organisations were funded in the 2022/23 Annual Funding Programme round, receiving a total of £14.7m in support. This represented an increase of 13% or £1.6m on the previous year.

Two organisations were moved out of the portfolio.

As can be seen in Table 2.1, the exchequer remained the primary source of funding, supporting a total of 40 organisations. The remaining 55 organisations received either a mix of exchequer and lottery funding or lottery funding.

Table 3.1: Source of 2022/23 AFP funding

Source	Sum	Number of organisations
Exchequer	£9,626,570	40
Lottery/Exchequer	£3,446,332	32
Lottery	£1,643,588	23
Grand Total	£14,716,490	95

Table 2.2 shows that organisations classified as large<sup>2</sup> received 51% of the funding awarded, equating to an average grant of £468,261 per organisation. In comparison, the 33 small scale organisations received 13% of funding, at an average of £57,535.

Table 3.2: Total awards by scale of organisation

Scale	Sum	Number of organisations
Large	£7,492,173	16
Medium	£5,325,666	46
Small	£1,898,651	33
Grand Total	£14,716,490	95

By artform, organisations classified under combined arts received the largest proportion of funding, equating to 37% of the funding pot or £5.5m. Dance based organisations received £325,100 in support, representing 2% of the total funding pot.

Table 3.3: funding by artform

Artform	Sum	Number of organisations
Circus	£493,995	4
Combined Arts	£5,432,505	33
Dance	£325,100	4
Drama	£2,158,761	11
Literature	£348,807	5
Music	£4,029,800	12
Traditional Arts	£628,783	11
Visual Arts	£1,298,739	15
Grand Total	£14,716,490	95

<sup>2</sup> Organisations are classified into large, medium or small depending on their total income received. Large: over £800,000; medium between £200,000 and £800,000; and small, less than £200,000

## 4 Workforce

Table 3.1 shows overall workforce levels compared to the previous year and the pre-pandemic year of 2019/20. Findings show us that:

- The overall workforce is now back to 2019/20 levels, having grown by 29% in 2021/22.
- The contracting of workers in part-time and full-time positions saw the greatest growth.
- Growth in permanent positions is slower and despite some growth over the last two years, permanent (full-time) positions remain 6% lower than in 2019/20.
- The more substantial growth for both permanent and permanent posts remain in part-time positions.

Table 4.1: changes in workforce composition

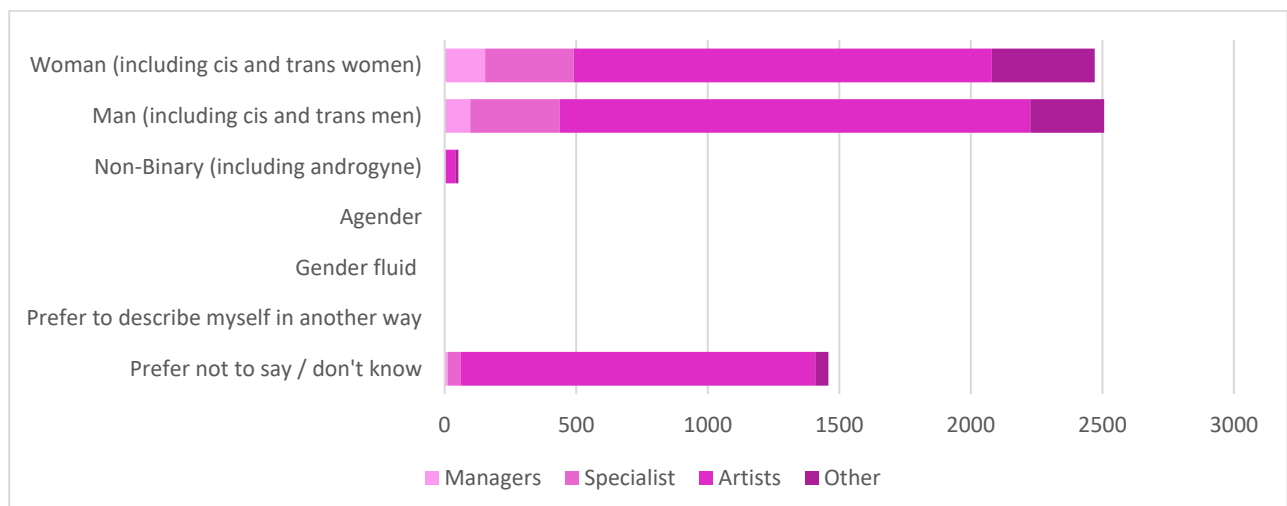
	2019/20	2021/22	2022/23	% change (21/22)	% change (19/20)
Permanent full-time	529	471	496	5%	-6%
Permanent part-time	406	387	414	7%	2%
<b>Total (permanent)</b>	<b>935</b>	<b>858</b>	<b>910</b>	<b>6%</b>	<b>-3%</b>
Contract full-time	684	524	671	28%	-2%
Contract part-time	4,790	3,654	4,916	35%	3%
<b>Total (contract)</b>	<b>5,474</b>	<b>4,178</b>	<b>5,587</b>	<b>34%</b>	<b>2%</b>
<b>Total workforce</b>	<b>6,409</b>	<b>5,036</b>	<b>6,497</b>	<b>29%</b>	<b>1%</b>

### 4.1 Gender

Of those reporting their gender, the workforce can be categorised into either man (50%) or woman (49%).<sup>3</sup> Those describing themselves as non-binary represents 1% of the workforce.

Including all response categories, nearly one-third (29%) were unknown, or individuals preferred not to say.

Figure 1: gender identity, permanent and contract (full-time and part-time)



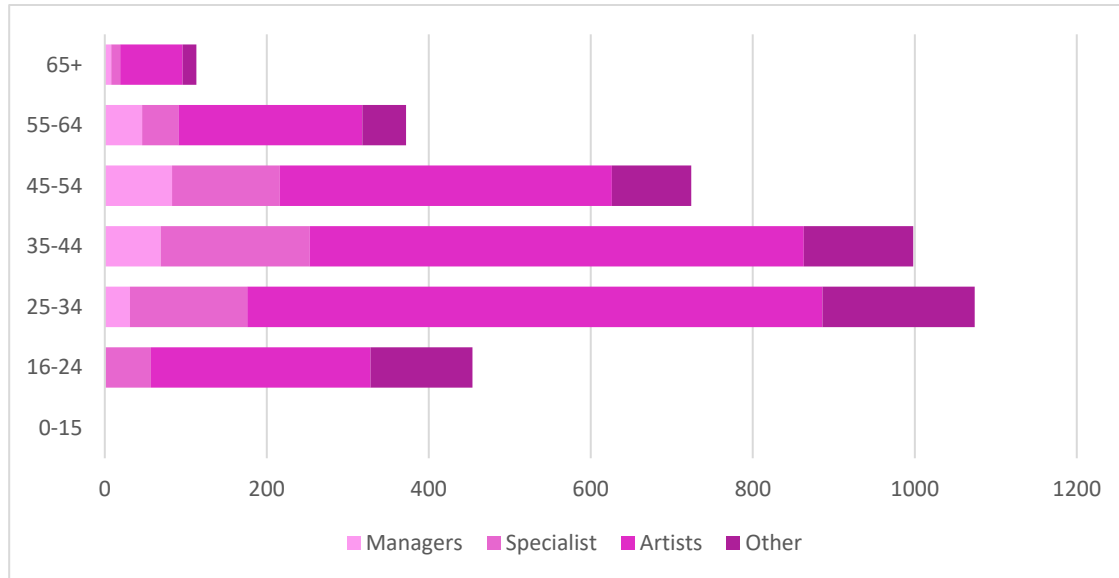
<sup>3</sup> Excludes prefer not to say / don't know

## 4.2 Age

Of those reporting their age, those age 25-34 comprised the largest proportion of the overall workforce (29%).

This varied slightly by employment category, with those employed in management capacities tending to be older. In contrast, those employed as artists tended to be slightly younger.

Figure 2: age, permanent and contract (full-time and part-time)



## 4.3 Disability

Eight percent of the overall workforce (permanent and contract) had a disability, a reduction of 1 percentage point compared to the previous year.

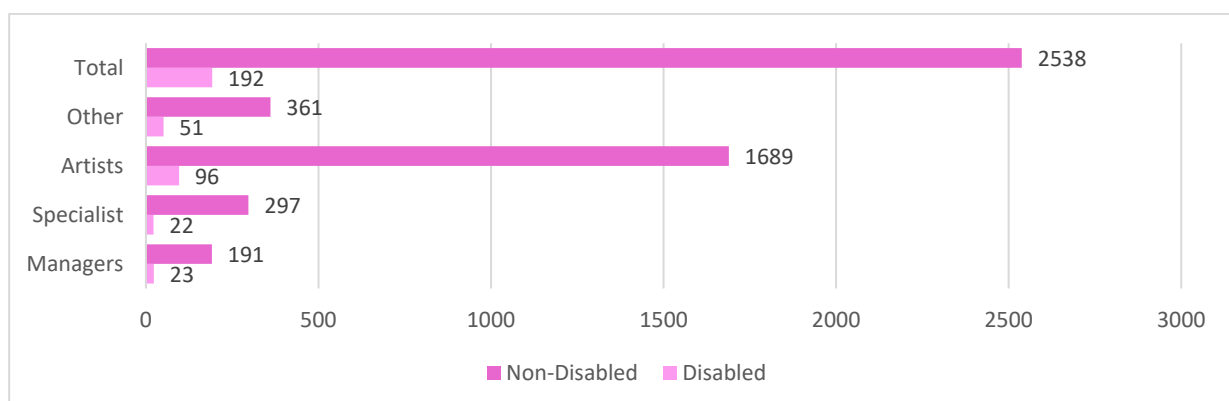
In 21/22, this rate was higher for those employed on a permanent basis (9%) compared to those employed on a contract basis (6%).

The proportion of respondents choosing 'prefer not to say' or 'not known' fell, compared to the previous year fell from 65% to 43%.

The level of disability by employment type varied, with those employed in 'other' capacities (including administration and technical staff) reporting the highest levels of disability (14%), followed by managers (12%) and specialists (7%).

Only 6% of artists reported having a disability.

Figure 3: disability, permanent and contract (full-time and part-time)



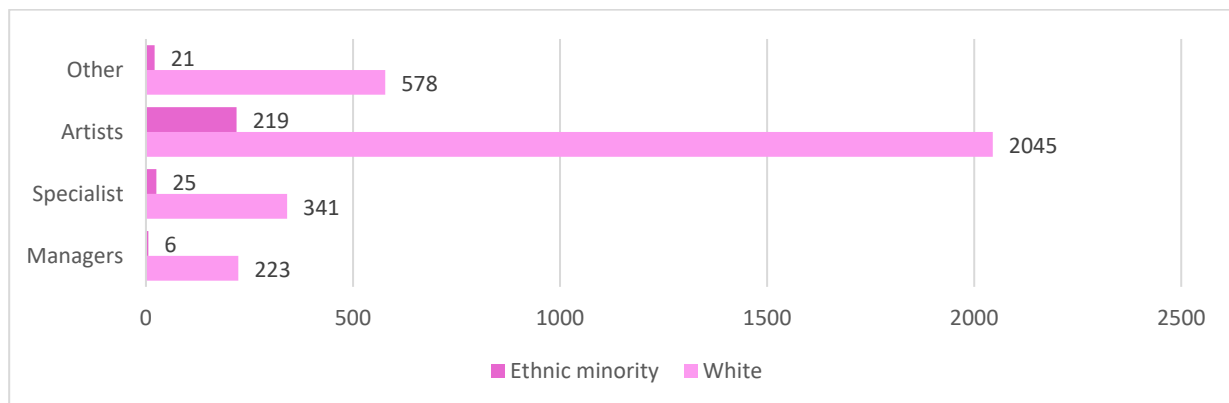
## 4.4 Ethnicity

Nine percent of the workforce population (combined permanent and contract) was from an ethnic minority background. This was 3 percentage points higher than in 2021/22.

There were increases in ethnic minority representation across all four employment classifications with the greatest relating to artists which increased from 8 percentage points to 11 percentage points.

Of note at an overall workforce level were increases in representation of mixed ethnic groups (39%), black Africans (13%) and Arabs (9%) as a proportion of the minority ethnic population.

Figure 4: ethnicity, permanent and contract (full-time and part-time)



## 4.5 Boards

In 2022/23, the 95 organisations receiving core funding employed 700 board members. Although this represented a 3% reduction on the previous year, there were 2 fewer organisations participating in the survey. Average board size has remained constant at 7.37 members per organisation.

There were more women (including cis and trans women) on boards than men. On average, there were 4.00 women employed, compared to 3.63 men. This trend has stayed consistent for the last 3 years. A total of three board members identified as non-binary in 2022/23.

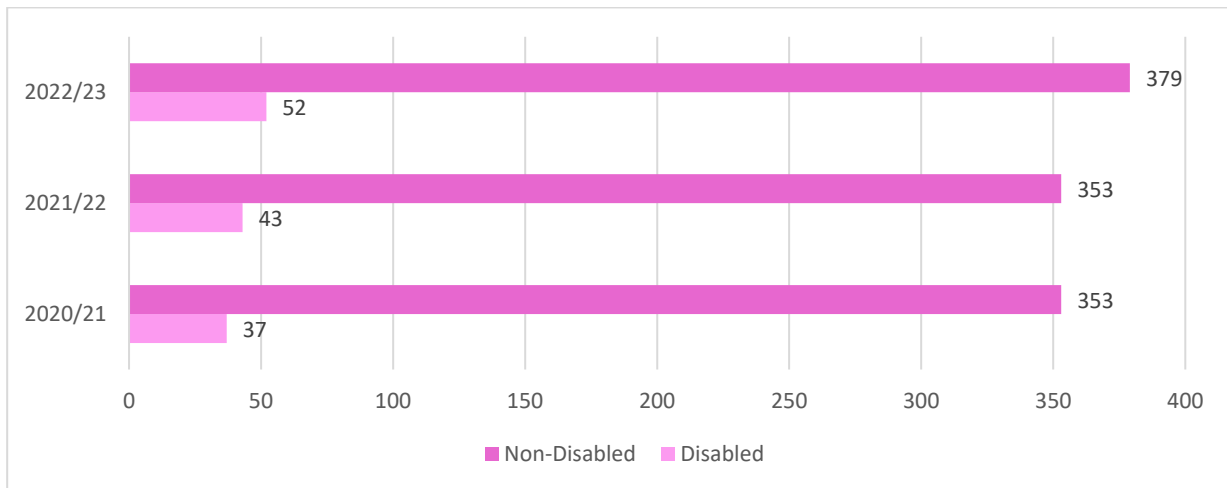
As with previous years, those aged between 55-64 were represented the most at board level, although to a slightly lesser extent in 2022/23, down by 13%. There were year-on-year reductions in all age group categories, except for those aged 65 years and over which increased by 14% compared to the previous year.

The proportion of disabled people engaged on boards by organisations has increased from 12% in 2021/22 to 14% in 2022/23. Of note also, is that the proportion of the board workforce choosing to report their disability status increased by 7 percentage points to 62% (n=431).

This means we can have greater confidence in reporting the figure as accurate and that employees are more confident responding to this question.



Figure 5: Number of disabled and non-disabled people employed on boards.



## 4.6 Volunteering

Organisations reported 1,608 volunteers in 2022/23, an increase of 11% compared to the previous year. The largest proportion of volunteers were aged between 16 and 24 year of age (18%).

The number of organisations engaging volunteers rose by 24% to 68, representing 65% of all Annual Funded organisations.

Community and festival-based organisations were the largest recruiters of volunteers.

There is evidence that volunteers are being recruited to take on previously paid roles so that organisations can maintain service provision. In some cases, organisations are being run by a board of volunteers, rather than paid staff.

## 5 Finances

### 5.1 Earned income

Table 5.1: earned income generated by source

	2019/20	2021/22	2022/23	% change 19/20	% change 21/22
Box Office	11,224,432	6,606,924	13,398,195	19%	103%
Professional services	3,154,763	3,863,700	4,608,417	46%	19%
Bar/Catering Sales	2,682,187	1,789,160	3,697,088	38%	107%
Other	2,933,547	1,792,841	3,323,519	13%	85%
Rent from Tenants	1,066,519	568,818	808,919	-24%	42%
All other sources	1,750,849	1,969,886	2,749,791	57%	40%
<b>Total</b>	<b>22,812,297</b>	<b>16,591,329</b>	<b>28,585,929</b>	<b>25%</b>	<b>72%</b>

- Earned income increased by 72% year-on-year to £28.6m and now exceed pre-Covid levels by 25%.
- Earned income now represents 43% of all income sources, an increase of 12 percentage points compared to 2021/22.
- Growth in earned income was driven by large-scale organisations. These organisations saw their box-office income increase by 99% year-on-year (£6m). Box-office income for these organisations now exceeds that generated in the pre-pandemic year 2019/20.

### 5.2 Public sector income

Table 5.2: public sector income generated by source

	2019/20	2021/22	2022/23	% change 19/20	% change 21/22
NI Govt. Dpt, agencies or ALB	3,292,439	4,197,191	4,731,761	44%	13%
NI Local authority funding	3,497,516	3,794,346	4,060,511	16%	7%
Trusts and foundations	338,425	3,010,732	3,621,629	970%	20%
Other UK public sources	1,850,380	3,615,499	3,117,079	68%	-14%
An Chomhairle Ealaíon	1,437,675	2,113,589	2,189,657	52%	4%
All other sources	4,739,586	3,034,172	2,866,866	-40%	-6%
<b>Total</b>	<b>15,156,021</b>	<b>19,765,529</b>	<b>20,587,503</b>	<b>36%</b>	<b>4%</b>

- Overall, income from public sector sources (excluding ACNI) increased by 4% year-on-year to £20.6m.
- Public sector income now represents 31% of income sources for all organisations (a fall of 6% compared to 2021/22).
- Small scale organisations saw the largest increase in support from public sector sources, up 45% year-on-year to £1.42m. By comparison, large scale organisations saw their income from public sector sources fall slightly from £10.7m to £10.6m.

- Income sourced from trusts and foundations grew by 20% year-on-year and is a more significant funder of organisations compared to before Covid.
- Income from European funding sources including Creative Europe and Erasmus continue to decline with income now 56% lower than in 2019/20.
- Public sector income from sources outside NI, remain higher than pre-pandemic levels but fell year-on-year, down 17%.

## 5.3 Core costs

Table 5.3: core costs by source

	2019/20	2021/22	2022/23	% change 19/20	% change 21/22
Salaries	15,600,204	19,424,407	23,417,723	50%	21%
Other Core Costs	2,957,281	3,086,674	2,775,636	-6%	-10%
Maintenance and Security	1,123,411	1,875,064	1,951,751	74%	4%
Rent and Rates	1,327,857	1,474,200	1,565,990	18%	6%
Light and Heat	875,535	980,839	1,475,751	69%	50%
All other sources	2,525,588	3,204,421	3,615,809	43%	13%
<b>Total</b>	<b>24,409,876</b>	<b>30,045,605</b>	<b>34,802,660</b>	<b>43%</b>	<b>16%</b>

- Salary costs increased by 21% year-on-year and are now 50% higher than in the pre-pandemic year of 2019/20, comprising 67% of all core costs (£23.4m).
- Salary costs reported by small scale organisations fell by 10% compared to the previous year, to £1.1m. This may be the consequence of organisations attempting to keep their core costs down by reducing the number of staff on full-time contracts.
- There were other significant year-on-year increases in rent and rates (6%), light and heating (50%) and printing costs (34%).
- For all organisations, core costs increased by 16% (£4.8m) year on year. This represents an increase of 43% (£10.4m) compared to 2009/20.

## 5.4 Programming costs

Table 5.4: programme costs by source

	2019/20	2021/22	2022/23	% change 19/20	% change 21/22
Artists	17,510,530	11,159,156	14,886,225	-15%	33%
Other Programming Costs	4,548,716	5,132,594	6,365,895	40%	24%
Publicity / Marketing / Promotion	1,568,185	1,269,679	1,920,084	22%	51%
Equipment / Materials	1,651,174	2,061,033	1,892,586	15%	-8%
Travel, Acc, Subsistence	1,130,972	567,918	1,324,831	17%	133%
All other sources	1,552,655	2,650,810	2,933,048	89%	11%
<b>Total</b>	<b>27,962,232</b>	<b>22,841,190</b>	<b>29,322,669</b>	<b>5%</b>	<b>28%</b>

- Artists costs increased by one-third in 2022/23 to £14.9m, representing 51% of total programming costs.
- Consistent with the increase in volunteer numbers (see section 3.6), volunteer expenses have increased substantially, although they remain less than 1% of programming costs.
- Although higher than the pre-pandemic year of 2019/20, premium costs (expenditure on actions associated with increasing access for Section 75 groups) fell by 79%, year-on-year.
- Travel, accommodation, and subsistence costs increased by 133% year-on-year (£756,913).
- Expenditure on equipment and materials fell slightly year-on-year, by 8%. For small scale organisations these costs are now 33% lower than pre-covid levels. Increasing trends towards recycling sets, creating smaller-scale sets and producing sets at destination venues have all contributed to cost reductions.

# 6 Organisation Activity

## 6.1 Engagement

Survey findings show that face-to-face engagement levels (in the form of physical performances, participation, exhibitions, and cinema screenings) continue to grow. The main findings are that:

- The number of activities delivered year-on-year has doubled to just over 60,000, still 13% lower than 2019/20 pre-Covid levels.
- The proportion of 'known' audiences, that is those audiences counted using reliable methods, increased by 66% to 1.96m.
- The proportion of 'estimated' audiences, that is those audiences counted using less reliable methods, increased by 67% to 3.72m.
- Overall engagement (combined known and estimated audiences) now stands at 5.67m, still 21% lower than 2019/20.

Figure 6: changes in physical engagement by activity type (2021/22 to 2022/23) ('000)

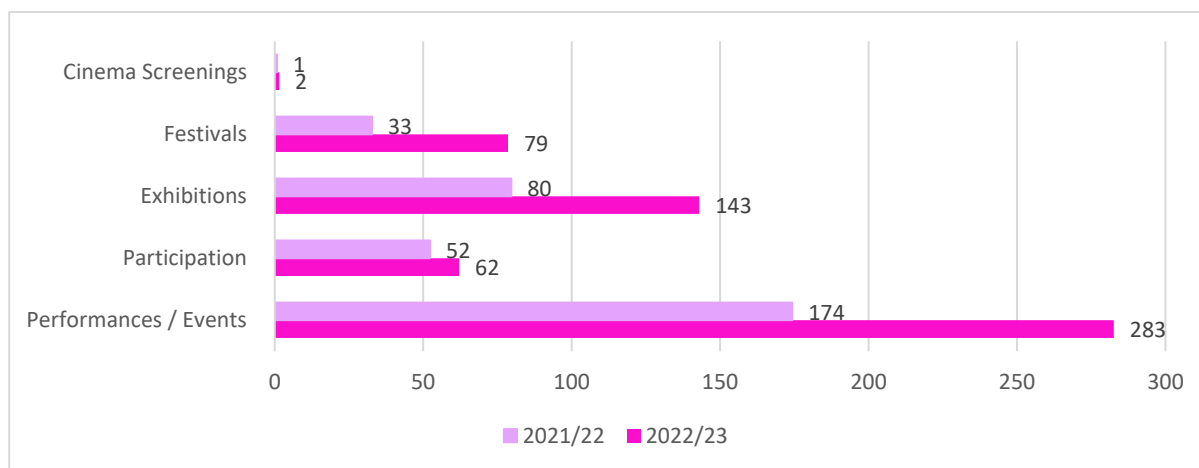


Figure 6 provides a breakdown in engagement by activity type over the past two years. It shows that engagement in all areas has grown, with significant growth in festivals, exhibitions, and performances. Engagement levels in participation-based event, although higher, show a more modest increase.

Figure 7: changes in physical attendances by activity type between 2019/20 and 2022/23 ('000)

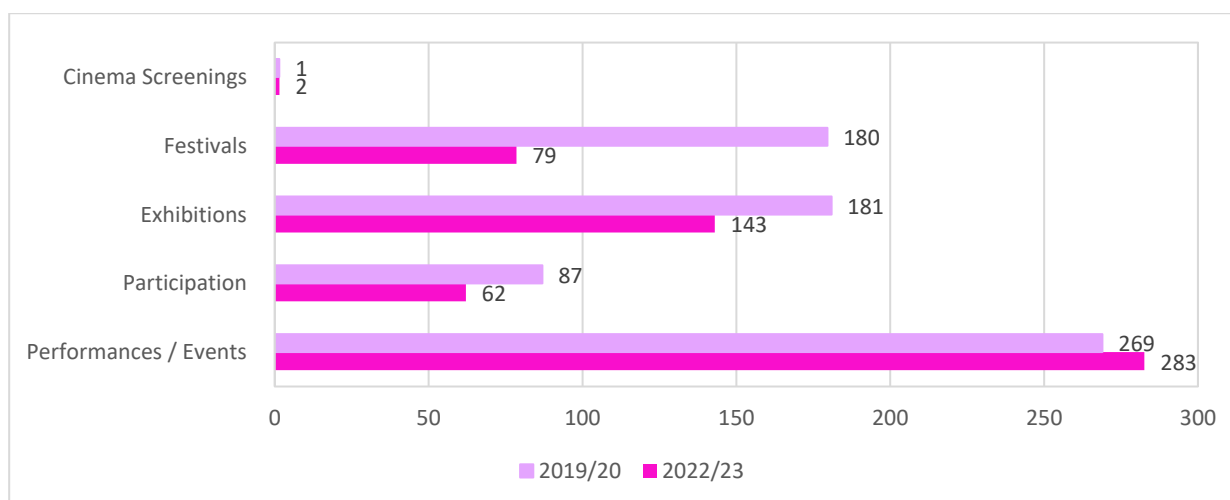


Figure 7 shows 2022/23 engagement compared to pre-covid 2019/20 levels. Except for performances, engagement in all areas remains substantially lower than in 2019/20.

Engagement levels in performances show much stronger growth and now exceed 2019/20 levels by 5%, reaching 2.83m. This represents a 62% increase on the previous year. Although the number of performances increased, average audiences fell between the two years from 283 to 248.

## 6.2 Online products

The survey shows that the number of new online activities produced fell by 36% compared to the previous year. The number of organisations producing them also fell by 28%.

Table 5.1 shows that although there was a marginal increase in total interactions, the proportion of 'known' interactions (those that can be relied upon as accurate) fell by 57%.

Table 6.1: number of new on-line products

	2021/22	2022/23	% Change
Number of organisations	69	50	-28%
Number of on-line activities	3,597	2,306	-36%
Known on-line interactions	1,676,766	722,029	-57%
Estimated on-line interactions	1,568,955	2,629,853	68%
Total interactions	3,245,721	3,351,882	3%
Average interactions	52	46	-12%

Like the trend for new on-line products, the proportion of organisations producing digital versions of existing products fell by 38% between 2021/22 and 2022/23 (table 5.2).

On-line activities (new and existing) only generate a small proportion of box-office income. In 2022/23, it represented less than 1% of all ticket sold by all organisations.

Table 6.2: number of digital versions of existing products created and/or distributed

	2021/22	2022/23	% Change
Number of organisations	58	36	-38%
Number of productions	42,544	3,510	-92%
Number of known audiences	1,096,981	998,356	-9%
Number of estimated audiences	320,951	926,512	189%
Total audiences	1,417,932	1,924,868	36%
Average productions per organisation	734	98	-87%

### 6.3 Audience accessibility measures

Table 5.3 shows the range of self-reported measures used by organisations to support audiences and improve accessibility. Methods described here are self-interpreted by the respondent and are not consistent with any standardised definitions e.g., relating to accessible toilets.

2022/23 findings show us that:

Communications:

- Except for British Sign Language (BSL) interpretation, communications access support fell across all methods between 2021/22 and 2022/23. There was a particular sharp decline in the provision of captioning and audio-description support.

Physical access:

- Most organisations reported offering some form of physical access support, in the form of wheelchair provision, accessible toilets or lifts.

Navigation and dedicated activity:

- This year's survey shows that the number of organisations providing dementia friendly and multisensory workshops increased by 5.

Table 6.3: change in number of organisations providing accessibility support 2021/22 to 2022/23

Method		2021/22 (n=97)	2022/23 (n=95)	Change
Communications	Braille	9	7	-2
	Large print	32	29	-3
	Induction loop	26	25	-1
	Captioning	40	30	-10
	Audio Description	29	22	-7
	BSL interpreter	19	21	2
	ISL interpreter	9	8	-1
Physical	Wheelchair access	88	89	1
	Accessible toilets	85	85	0
	Lifts	67	69	2
Navigation	Signage	73	72	-1
	Maps	46	50	4
Dedicated activity	Relaxed performances	46	45	-1
	Dementia friendly	36	41	5
	Multisensory workshops	30	35	5

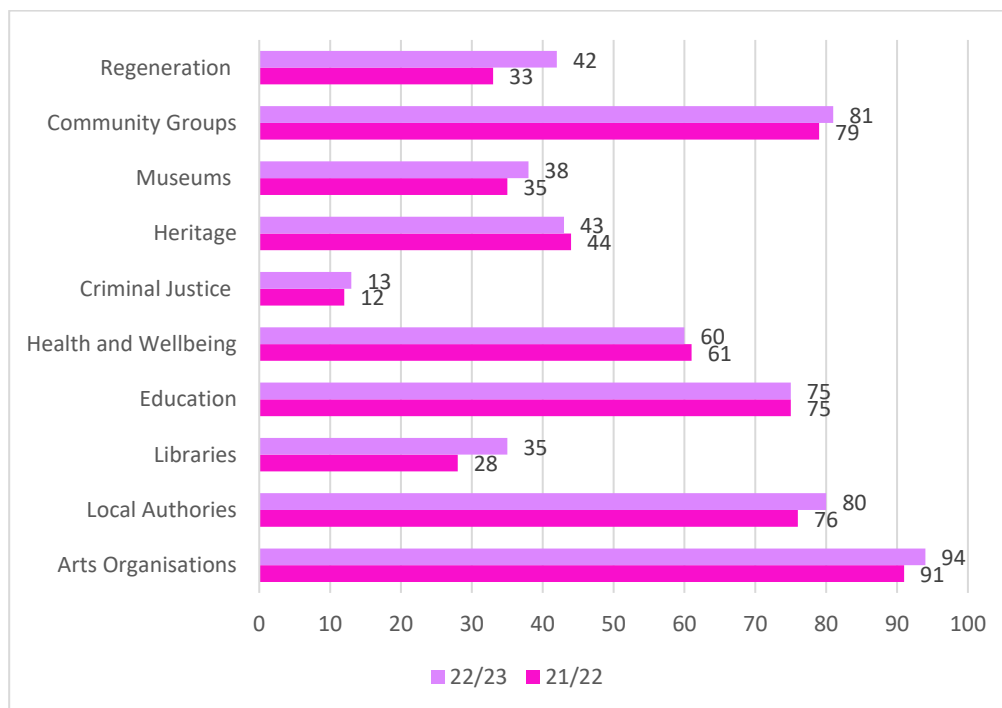
## 6.4 Cross-sector engagement

Survey findings show that funded organisations partner a diverse range of non-arts sectors to support positive local change and enhance service delivery in areas such as education, health and well-being and regeneration.

Figure 8 shows that the number of organisations collaborating other sectors has remained consistent compared to the previous year with slight increases in those working with regeneration-based organisations (+9), libraries (+7), local authorities (+4) and other arts organisations (+3).

In percentage terms, collaborative working increased by 5% compared to the previous year to 59% (n=56). In 23% of cases, these relationships were deep enough to formalise, in the form of a partnership agreement.

Figure 8: change in the number of partnership collaborations





## 6.5 Engagement with creatives / practitioners outside Northern Ireland

Core funded organisations continue to work with creatives and practitioners outside Northern Ireland by either hosting them locally or delivering activity in other regions of the world.

This dynamic helps to enrich cultural practice locally, develop creative networks, and provides additional income streams for local organisations.

Of the 1,599 activities delivered within this context, 40% was stand-alone (not part of a tour); 35% involved hosting creative practitioners in NI; and 13% involved arranging work for NI based creatives.

Figure 9 shows the number of funded organisations working with creatives and practitioners outside Northern Ireland. ROI based creatives/ practitioners were engaged with the most, followed by GB and EU based practitioners / organisations.

Figure 9: regions engaged by core funded clients.

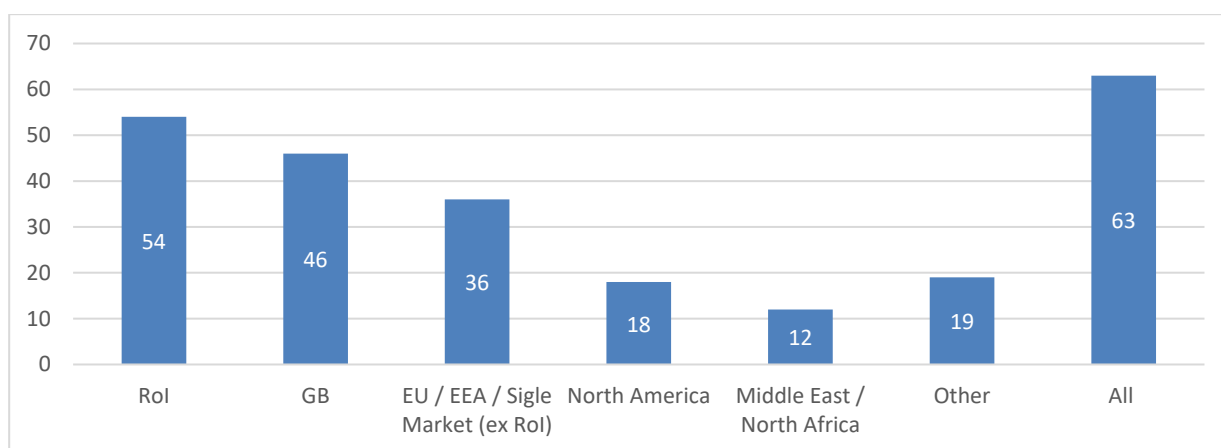
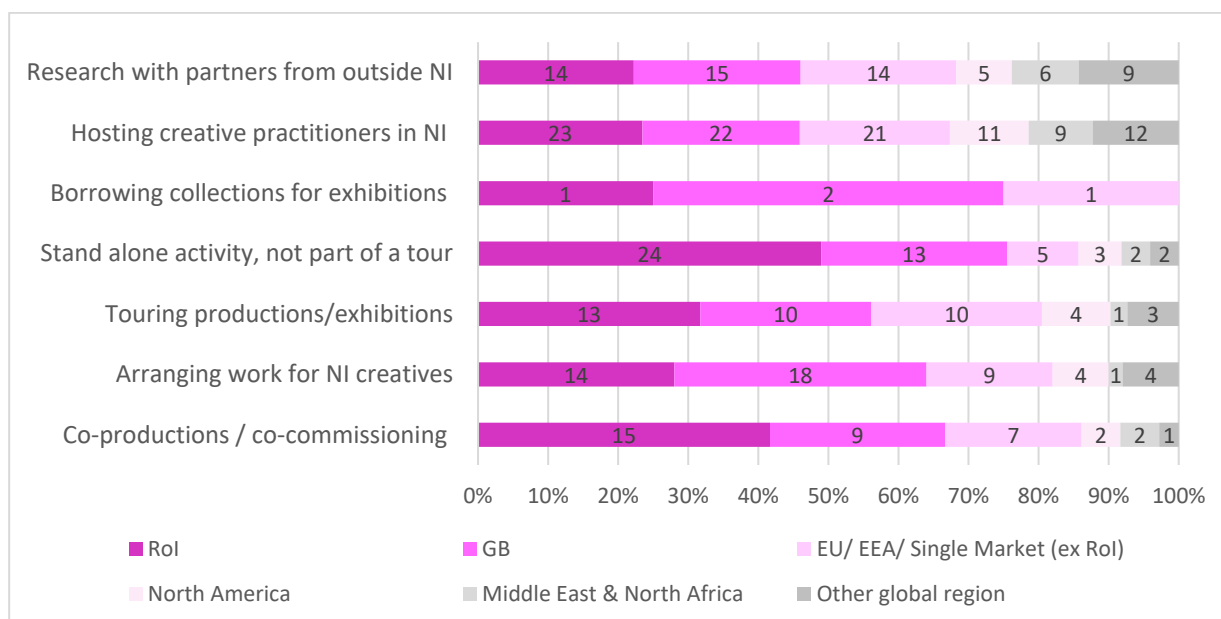


Figure 10 shows the number and regional location of organisations engaged by activity type. Significant is the extent funded organisations host creative practitioners from across the globe, with 9 organisations hosting either creatives or creative organisations from the Middle East or North Africa.

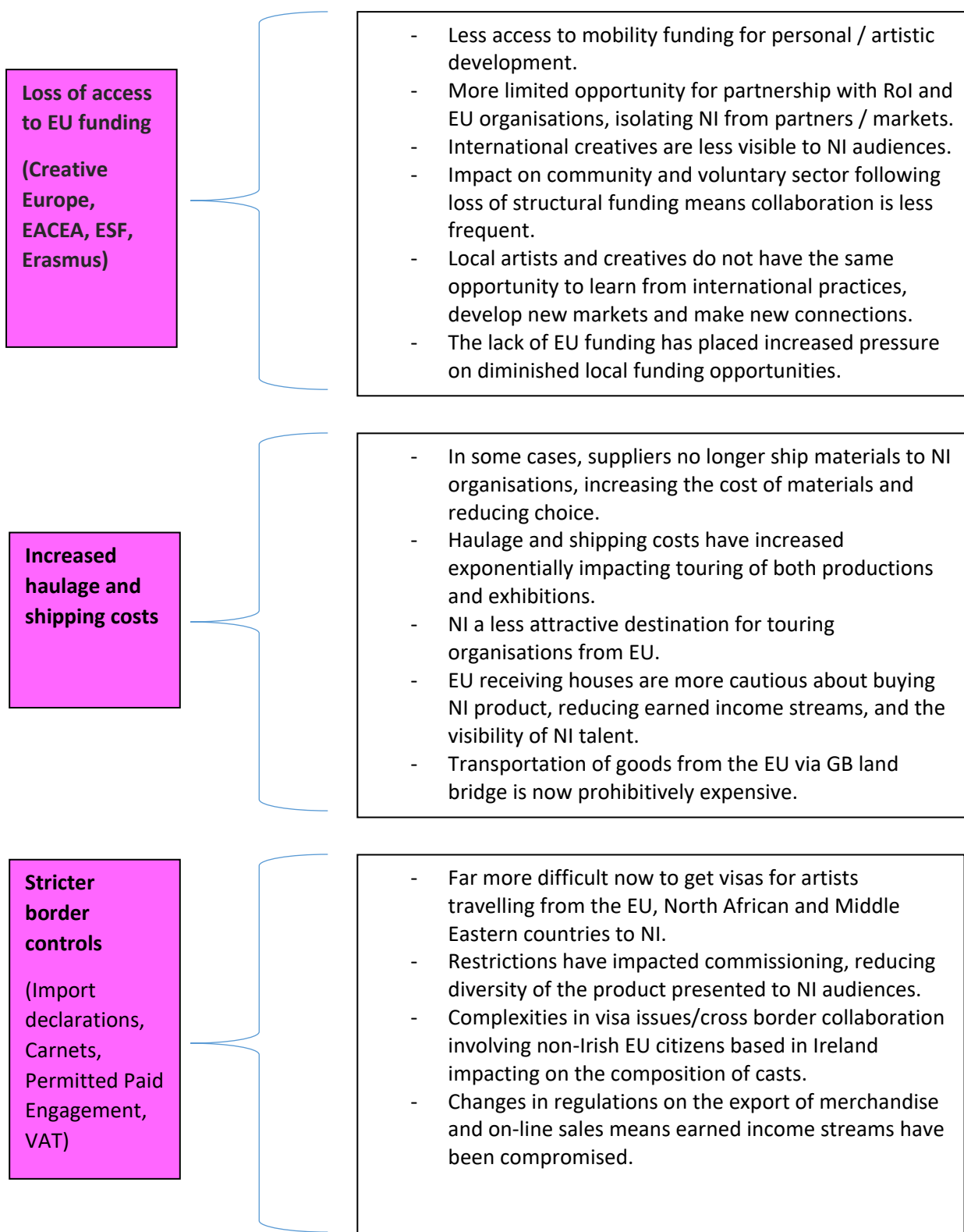
Figure 10: number and regional location of organisations engaged by activity type.



## 6.6 Implications of the UK leaving the EU

61 organisations (64%) described a range of continuing direct and indirect consequences of the UK leaving the EU. These have been summarised in Figure 11 below. A fuller breakdown of responses received can be found in Appendix 1.

Figure 11: Summary of direct and indirect consequences of the UK leaving the EU.



Appendix 1 – Summary of impacts associated with leaving the EU

Action / Barrier	Outcome / Impact
Loss of access to EU funding / partnership opportunities	Members have less access to mobility funding for personal development.
	More limited opportunity for partnership with RoI and EU organisations.
	We can no longer participate with our EU network of over 100 organisations cutting off access to learning that would benefit our staff and members.
	Inability to partner / collaborate with organisations in the south is fuelling all-island divergence and investment in skills development locally.
	We can no longer access Creative Europe funding opportunities e.g., 'Culture Moves Europe'. This impacts our ability to host international artist residencies.
	European Social Fund (ESF) restrictions faced by partner organisations working with disabled young people in the community and voluntary sector have reduced opportunities for us to engage / support their work.
	Unable to apply for the Erasmus, Volunteer and EACEA funding compromises the work of our organisation and the potential impact it has.
	NI based creatives are less marketable to EU based creative organisations.
	The lack of complimentary EU funding sources has increased pressure on local funding sources, this is unsustainable in the long term.
	We are about to deliver our final EU project meaning we won't now be able to generate project income that has sustained our income for a number of years.
	Our ability to deliver best practice initiatives and models for engaging with d/Deaf, disabled, and neurodiverse artists and audiences has been compromised.
	Increase costs
Hugely more expensive to transport exhibitions and goods to NI. Alternative products often more expensive and of lower quality.	
Planning horizons have moved from 2 to 6 months	
Supply chains are unpredictable and longer lead in times still don't guarantee goods are delivered on time.	
Artists touring costs have increased significantly due to the rise in fuel costs, accommodation, shipping.	
Freight and transportation costs are up by 35% with because of the new custom/carnet requirements. This varies according to country but averages at £350+VAT for each company.	

	Increased internal EU mileage costs as 'easier' to avoid the GB land bridge when EU-based companies travel to the island of Ireland (eg. Belgian company for BCF23 drove from Ghent to Cherbourg to meet ferry. Costs covered by us as the receiving organisation.
Border restriction	Difficulties getting VISAs for visiting artists travelling from EU, N African and Middle East countries.
	Import declarations now required for some instruments into NI.
	Permitted paid engagement letter now required for all visiting artists, creating extra costs and bureaucracy.
	Restrictions have impacted who we commission, impacting on the diversity of the product we can present for NI audiences.
	Transportation of goods from the EU via GB land bridge now prohibitively expensive.
	Complexities in visa issues/cross border collaboration involving non-Irish EU citizens based in Ireland impacting on the composition of casts.
	Ongoing uncertainty surrounding visa and work permit arrangements for visiting artists from EU countries impacting festival programming
	Prohibitive restriction associated with the recruitment of a non-EU based interns meant our programmes were unable to benefit from their knowledge.
	Touring artists and musicians are significantly more expensive to book to perform. We try to keep ticket costs down to ensure equity in access but can't absorb the extra costs either.
	We now host significantly less international work because of changes in the border control.
	Changes in regulations on the export of merchandise and on-line sales means our earned income streams have been compromised.
	Now impossible to bring artists from certain regions to NI, from African countries - we had several artists that were unable to get visas and concerts had to be cancelled. This will undoubtedly result in a narrower less diverse music scene.
	There are tax, insurance and operating costs implications for all-island organisations based in Northern Ireland.
Changing paid permitted engagement visa requirements needing additional time, paperwork, and expense for both us and visiting company.	

**Arts Council of Northern Ireland**

Linen Hill House  
23 Linenhall Street  
Lisburn  
BT28 1FJ

[artscouncil-ni.org](http://artscouncil-ni.org)

T: +44 (28) 9262 3555

E: [info@artscouncil-ni.org](mailto:info@artscouncil-ni.org)

Alternative formats of this publication may be available on request.  
For further information, email: [info@artscouncil-ni.org](mailto:info@artscouncil-ni.org)