Arts Council of Northern Ireland

2023-24 Annual Funding Survey

Key Insights Report

September 2024

1 Introduction

This report summaries information provided by the Arts Council’s funded organisations in the Annual Funding Survey (AFS) and compliments data released as Official Statistics on the 19th September 2024 which can be found on the Arts Council of Northern Ireland’s website.

The report looks at key trends and patterns in data provided by clients which, when combined, provides key insights into the overall health of the Northern Ireland arts sector.

The report is broken down into three sections: workforce composition, organisation finance (income and expenditure) and engagement / audiences.

Findings in this report are presented based on a constant sample of 83 AFP funded organisations. This is different from previous years because the overall funded portfolio fell significantly between 2022-23 and 2023-24 and comparisons would not have been like for like.

The classification 'size' is used in the report to group organisations into three groups depending on their total income: small (less than £200,000), medium (between £200,000 and £800,000) and large (over £800,000).

In line with funding requirements, all 84 AFP organisations funded in 2023-24 completed the survey in full. A full list of organisations returning surveys can be found in **Appendix 1**. Responding organisations account for a total of £13,268,919 in grant support taken from both Exchequer and National Lottery income streams.

2 Executive Summary

This year's findings show little overall growth in the sector either in terms of employment or income. This has impacted negatively on the number of activities delivered and level of audience / participants engaged.

Workforce

- There was no change in the overall workforce size in 2022-23, although the proportion of those employed in part-time contract/freelance roles continues to grow, largely at the expense of those employed on a full-time contract or freelance basis. This finding questions the sustainability of the sector and its increasing reliance on precarious freelance workers.
- The sector is heavily reliant on formalised and informalised volunteering to support its operations, people working for free to support organisation development and enhance customer experiences. Medium scale organisations seem particularly reliant on this part of the workforce, with 81% of organisations engaging their services.

Finance

- Income from all sources fell by 2.65% compared to the previous year, with the sharpest reduction being in earned income which fell by 6.32%. Box-office income grew by only 3%.
- Expenditure fell by 4% year-on-year, with the proportion being spent on programming costs falling by 8.82%. This reduction is reflected in reduced activity levels and highlights ho w income is being diverted to support core funning costs rather than being invested in production and creative development.
- In terms of public sector income organisations seem to increasingly draw on other UK and RoI sources.

Activity

- Despite high public engagement with the arts, especially post-pandemic, provision has contracted and remains fragile.
- The number of activities or events delivered increased since the pandemic but fell by 22% between 2022-23 and 2023-24. This was the case across all organisation sizes, with the greatest fall recorded by small scale organisations.
- The reduction in activity was absorbed by organisations delivering performances which fell by 27% and participation-based events, down 23%, when compared to the previous year. Other forms of activity including exhibitions and festivals saw their share of activity grow.
- The reduction in activity was reflected in levels of engagement, which fell by 10%.

- All funded organisations continue to target a proportion of their work at one or more marginalised group in Northern Ireland including disabled people, deprived neighbourhoods and supporting people with poor mental health/wellbeing. Small scale organisations were most likely to target their work at these groups
- The cost of delivery continues to supress the provision of disability access support to venues, although a third of organisations now provide an induction loop, some, most or all of the time.

International working

- Nearly three quarters of organisations continue to undertake international activity as part of their annual programmes, with the majority of collaboration taking place with creatives and organisations based either on the island of Ireland or GB. Of note was the reduction in engagement with creatives, audiences and organisations based within the EU.
- These findings compliment the small but growing proportion of earned income being generated from international touring in 2023-24, with touring destinations including Australia, India and Africa.

2.1 Workforce - Size

Employment category	Number of workers	% of total workforce	% change 22/23 to 23/24	% change since 2020-21
Part-time contract/freelance	3,961	79%	+6%	+21%
Full time contract/freelance	204	4%	-59%	-35%
Part-time paid, permanent	431	9%	+18%	+/-0%
Full-time paid, permanent	403	8%	+5%	+17%
		Total	+/-0%	16%

- There was a marginal reduction in the size of the overall workforce in 2023-24 in comparison to the previous year, shrinking by less than 1% to 4,999.
- Growth rate across all employment categories, seen in the post-pandemic years 2020-21 to 2022-23, looks to be slowing down, with a further contraction in contract/freelance workers employed on a full-time basis.
- Growth in full-time, permanent employment is contrasted by a more variable trend in part-time employment which has remains at 2020-21 levels.
- The sector shows an increasing reliance on part-time contract/freelance workers - the sustainability of which is vital to ensuring the ongoing production of high-quality arts experiences.
- There was some variability in organisation composition depending on their size. 91% of those employed by small scale organisations were either contract or freelance. This compared to 76% for large scale organisations.

2.2 Workforce - Gender[1]

Gender category	Number of workers	% of total workforce	% change 22/23 to 23/24	% change since 2020-21
Woman (including cis and trans women)	2,738	60%	30%	53%
Man (including cis and trans men)	1,739	38%	-7%	9%
Non-Binary	51	1%	+2%	+76%

- Women represent 60% of the workforce, with men, 38%. Only 1% of the workforce identify as non-binary (including androgyne).
- The proportion of women employed across all categories continues to grow, up 30% compared to 2022-23. In comparison, the number of men fell by 7%.
- Only within the employment category 'artist' are there more men employed than women (57% compared to 41%).
- Although still representing a small part of the reported overall workforce, the number of non-binary (including androgyne) workers has increased by 2% compared to 2022-23.
- Less than 1% of the permanent workforce are reported as non-binary, agender or gender fluid.

[1] These figures are from a smaller sample of organisations providing relevant data.

2.3 Workforce - Disability

	Managers	Specialist staff	Artists	Other Staff	All Staff	Northern Ireland[2]
Disabled	7%	15%	9%	8%	9%	24%
Non-disabled	93%	85%	91%	92%	91%	76%

Change in disability levels since 2020-21	+1%	+3%	-2%	+3%	+/-0%

- Disability levels within the workforce remain below that of the Northern Ireland average with around 1 in 10 reporting a disability, compared to 1 in 4 in the general population.

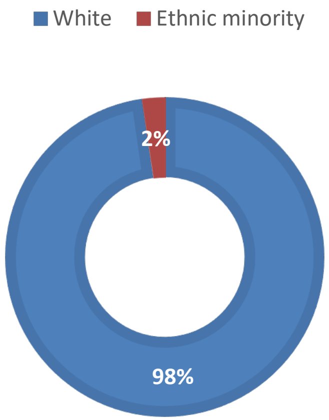
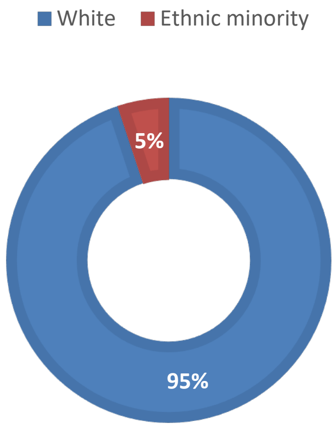
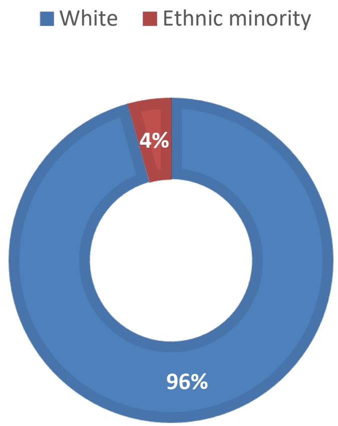
- Disability levels ranged by employment category from 7% amongst managers to 15% amongst specialist staff

- The proportion of the workforce reporting a disability has not changed overall since 2020-21, although there has been changes within specific categories, especially specialist staff and artists.

- These statistics are only based on a sample of two-thirds of the workforce. Improved employee monitoring at the organisation level will strengthen the quality of the data produced.

[2] ACNI uses the social model to define disability in its surveying work. NI Census of Population (2021), using a different one, referring disability to a 'limiting long-term health problem or disability.'

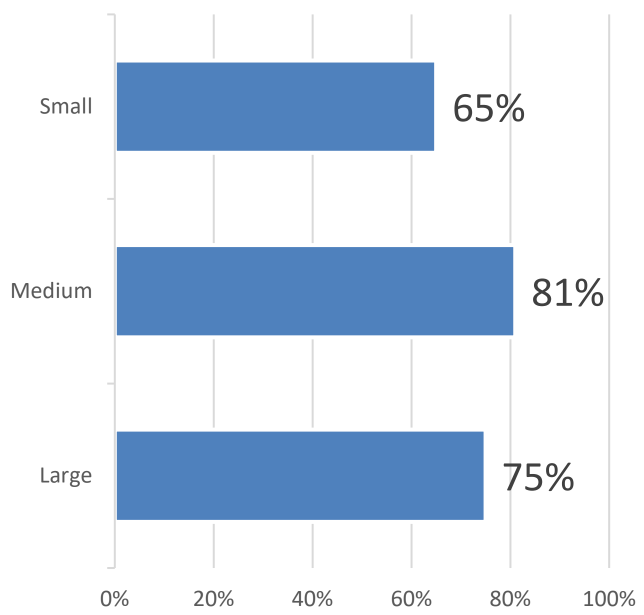
2.4 Workforce- Ethnicity[3]

Permanent paid staff	Contract/freelance staff	All staff
		
% Change in proportion of people employed with an ethnic minority background since 2020-21 +1%	-2%	-1%

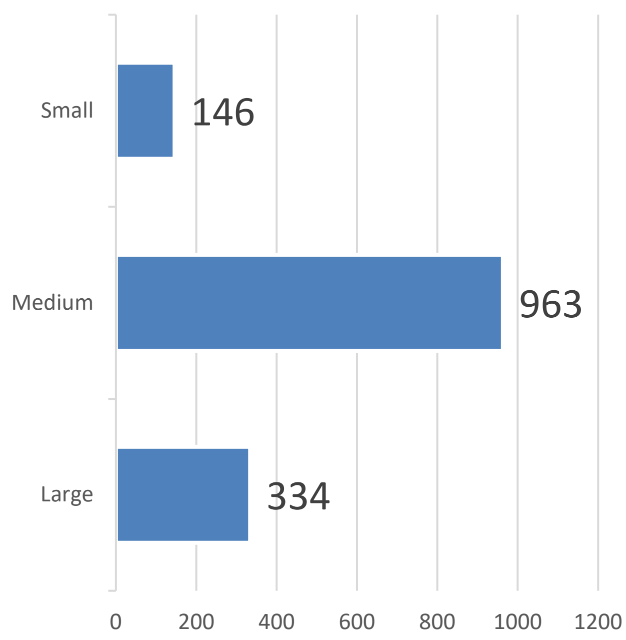
[3]Based on an overall sample of 57% of the workforce

2.5 Volunteering[4]

Recruitment of volunteers by organisation size



Number of volunteer recruitments by organisation size



- Volunteering plays an important role within the NI arts sector, supporting the work of the paid workforce by contributing their time for free.
- In 2023-24, volunteers engaged by small scale organisations gave the largest proportion of their time, totalling 31 hours per volunteer – this compared to 9 hours for those engaged by large scale organisations.
- 20% of volunteers in 2023-24 were aged between 16-24, with a further 18% aged between 25-24. This suggests volunteering is largely carried out by younger people.
- 57% of volunteers were women (including cis and trans), compared to 42% men (including cis and trans). 1% of volunteers described their gender as non-binary (including androgyne.

[4] Refers to those who receive no wages or salary, or who receive no more than basic expenses, for example travel costs.

3 Finances

3.1 Income

Income Source	£	% of total income	% change 22/23 to 23/24
Earned income	£24,446,289	43%	-6.32%
All public sources (including ACNI)	£26,479,594	47%	-1.42%
Private sources	£4,396,453	8%	-0.95%
Capital	£1,218,957	2%	+77.49%
Total	£56,541,293	100%	-2.65%

Earned Source	£ 2023-24	% of total	% change
Box Office	£12,858,541	53%	3%
Bar/Catering Sales	£3,279,696	13%	11%
Other	£2,775,447	11%	-14%
Professional services	£2,067,608	8%	-54%
Rent from Tenants	£840,823	3%	8%
Course fees	£608,351	2%	89%
International Touring	£507,735	2%	166%
Hire	£421,879	2%	18%
Domestic Touring	£329,514	1%	-36%
Membership Fees	£310,014	1%	-17%
Gallery Sales	£238,457	1%	-17%
Training	£175,215	1%	65%
Publications	£33,009	0%	155%

Arts Council of Northern Ireland	£13,077,134	49%	-6%
NI Local Authorities	£3,967,169	15%	13%
Government Depts.	£3,933,535	15%	-9%
Other UK sources	£3,472,019	13%	23%
Arts Council Ireland	£1,145,026	4%	-9%
Other RoI sources	£819,701	3%	55%
European funding	£65,010	0%	-85%

Trusts and foundations	£3,111,362	71%	7%
Sponsorship	£658,512	15%	6%
Donations	£570,499	13%	-31%
Fundraising events	£56,080	1%	-32%

3.2 Expenditure

Expenditure	£	% of total exp.	% change 22/23 to 23/24
Core	£29,980,714	55%	+0.27%
Programme	£24,692,357	45%	-8.82%
Total	£54,673,071	100%	-4.05%

Source	£	%	% change
Salaries	£20,612,611	69%	1%
Other Core Costs	£2,630,322	9%	16%
Maintenance and Security	£1,628,727	5%	-4%
Rent and Rates	£1,200,390	4%	-3%
Light and Heat	£1,107,887	4%	-5%
All other core costs	£2,800,777	9%	-12%
Artists' Costs	£14,230,890	58%	2%
Other Programming Costs	£3,413,773	14%	-45%
Venue Costs	£1,789,092	7%	132%
Publicity / Marketing / Promotion	£1,340,661	5%	-21%
Travel, Accommodation, Subsistence	£1,297,386	5%	16%
All other programme costs	£2,620,555	11%	11%

- Box office income showed signs of plateauing in 2023-24 compared to the previous two years, increasing by only 3% to £12.8m.
- Earned income for medium scale organisations increased by 11% between 2022-23 and 2023-24. This was largely driven by increases in income from touring, gallery sales and rent.
- Earned income sources for both small and large-scale organisations fell by over 10%.
- Income from government departments (excluding ACNI) continues to fall as a proportion of public funding, reducing by 9%.
- Public sector income for small-scale organisations fell by 19% between 2022-23 and 2023-24
- Although only representing 3% of public sector income, the amount generated from ‘other RoI sources’ increased by over 55%.
- Income from public sources remains at 8% of the overall income mix, with increases in contributions from trusts/foundation and sponsorship off set by reductions in income from donations and fundraising.

4 Engagement and audiences

Activity (FY 2023-24)

Number of activities	% change 2022-23 to 2023-24
45,083	-22%

Large	Medium	Small
-13%	-22%	-34%

Activity areas	Number of activities	% change 2022-23 to 2023-24
Performances	7,800	-27%
Participation based events	35,817	-23%
Exhibitions	372	36%
Festivals	947	54%
Cinema Screenings	147	65%

Activity fell by 22% in 2023-24 compared to the previous year, with small scale organisations seeing the largest fall (34%).

The fall was driven largely by reductions in the number of performances and participation-based activities delivered.

Audience / participant numbers (FY 2023-24)

Number of audience / participations	% change 2022-23 to 2023-24
1,597,142	-10%

Large	Medium	Small
10%	-43%	230%

Activity areas	Number of audiences / participations	% change 2022-23 to 2023-24
Performances	1,096,888	-4%
Participation based events	257,205	-32%
Exhibitions	141,597	-19%
Festivals	95,210	26%
Cinema Screenings	6,242	49%

Audience / participations fell by 10% compared to the previous year, with medium scale organisations impacted the most. Large scale organisations saw a modest increase in audiences and the volatility associated with small scale audiences over the last few years continues.

Mean % of client work programmes targeted at specific groups / themes

	Large Org	Medium Org	Small Org	All Organisations
Disabled people	11	22	36	23
Ethnic minorities	14	13	25	15
Deprived neighbourhoods	52	37	62	45
LGBTQ + groups	9	19	25	18
Older people (aged 65+)	18	18	27	20
Offenders / ex-offenders	5	30	15	16
Specifically Early Years (0-5)	9	16	15	14
Specifically Young People (6-18)	36	38	45	40
Environment	15	11	8	11
Health / Wellbeing	27	36	34	35

Deprived neighborhoods are targeted the most by all AFP clients (45%), followed by young people (40%) and health and wellbeing (35%).

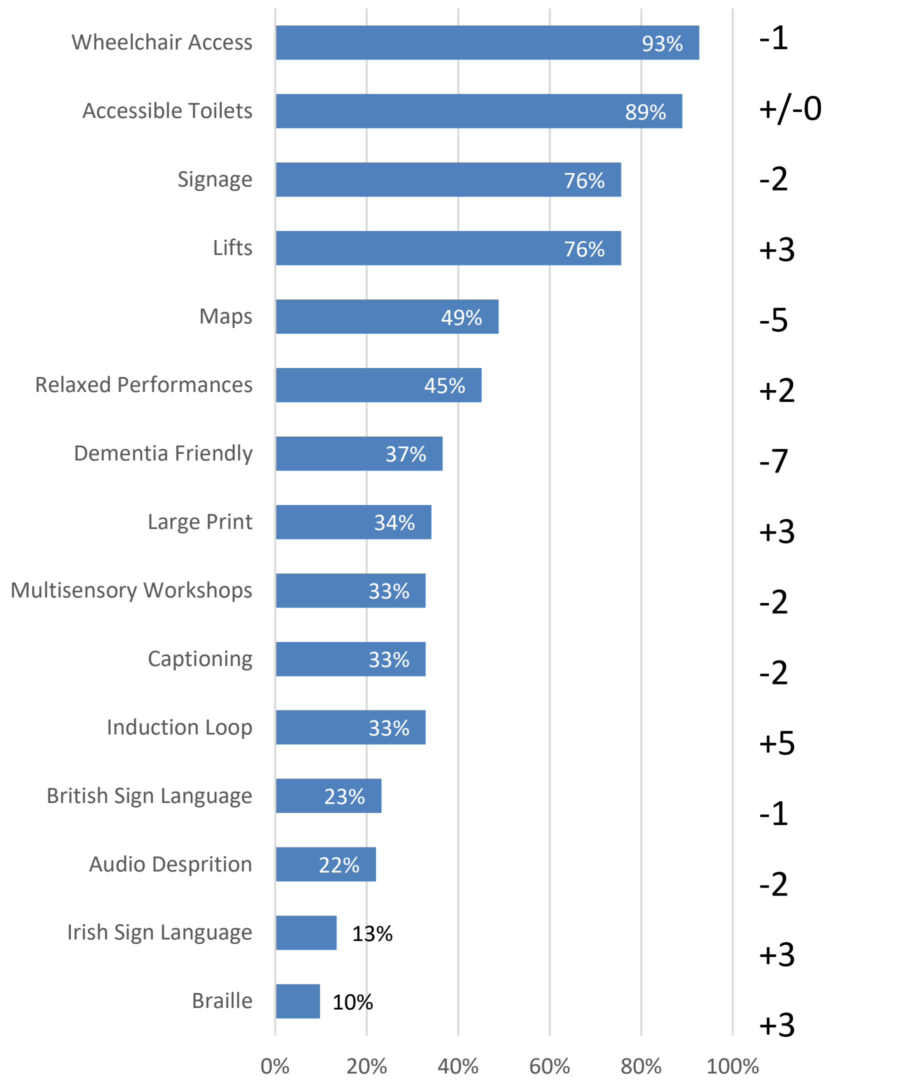
Small scale organisations allocate the largest proportion of their work programmes to targeting these groups / themes compared to medium and large-scale organisations.

The environment is becoming a more visible policy area amongst all organisations, with large scale organisations allocating the largest proportion of their programmes to this area (15%).

In 2023-24, relaxed performances were delivered by 45% of organisations, representing a 2% increase on the previous year.

Irish Sign Language (ISL) is being provided by a small but increasing proportion of funded organisations, with captioning and induction loops now used by one-third of organisations.

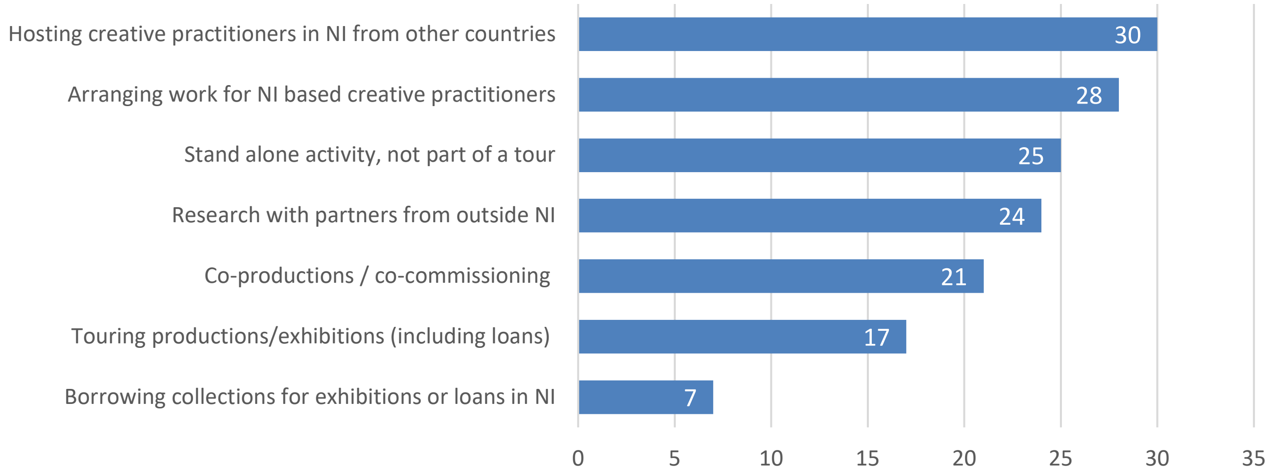
% of organisations providing accessibility support



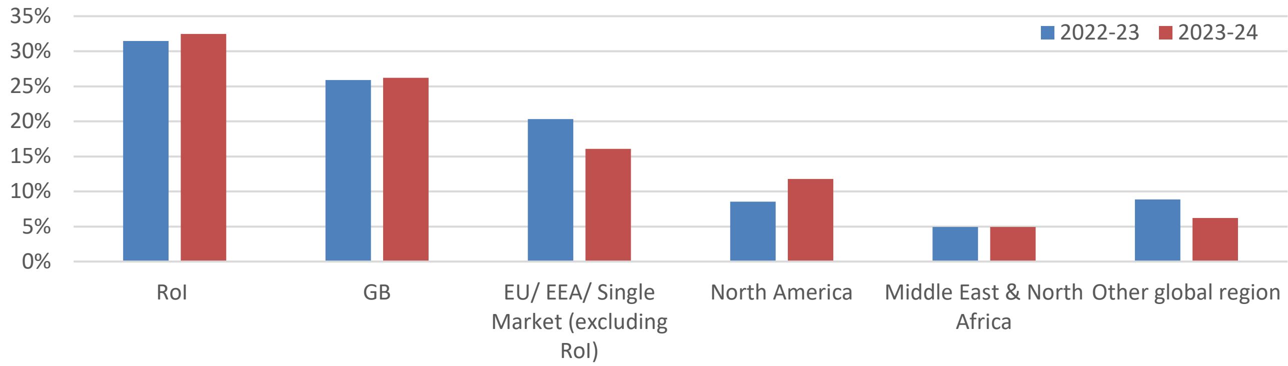
5 Activity delivered outside Northern Ireland

	Number of organisations	Number of activities
2023-24	59	1,908

Type of activity delivered (FY 2023-24)



Where activity took place or was originated from (FY 2022-23 and 2023-24)



- In 2023-24, 70% of organisations either delivered activity outside Northern Ireland or hosted activity by a creative or creative organisation locally.
- This activity helps to improve perceptions and relations between countries, increase the diversity of artistic product available to local audiences and strengthen earned income streams.
- In 2023-24, 59% of activity was with organisations or creatives based in the UK or RoI.
- The proportion of activity delivered in the EU/EEA/Single Market (excluding RoI) fell by 4% between 2022-23 and 2023-24.
- Funded organisations cite continued friction associated with the movement of goods and people to and from Northern Ireland restricting the extent and nature of possible collaborations.

Appendix 1: Responding Organisation

Annual Funding Programme

174 Trust/The Duncairn

All Set Cross Cultural Project

An Droichead

An Gaelaras Ltd

Andersonstown Traditional & Contemporary Music School

Array Studios

Arts & Business Northern Ireland

Arts Care

ArtsEkta

Beat Carnival

Belfast Exposed Photography

Belfast Festival T/A Belfast International Arts Festival

BelfastTrad (Traditional Music and Dance Society)

Big Telly Theatre Company

Cahoots NI Ltd

Camerata Ireland

Catalyst Arts Ltd

Cathedral Quarter Arts Festival

Centre for Contemporary Art Derry~Londonderry

Circusful

Craft Northern Ireland

Creative Exchange

Crescent Arts Centre

Cultúrlann McAdam Ó Fiaich

Derry Theatre Trust Ltd t/a The Millennium Forum

Digital Arts Studios

Down Community Arts Ltd

Drake Music Project Northern Ireland

DU Dance (NI)

Dumbworld Ltd

Dun Uladh Ltd

Dylan Quinn Dance Theatre CIC

EastSide Arts
Echo Echo Dance Theatre Company
Féile an Phobail
Flax Art Studios Ltd
Glasgowbury
Golden Thread Gallery Ltd
Greater Shantallow Community Arts
In Your Space Circus Ltd
Kabosh Theatre Ltd
Kids in Control
Maiden Voyage (NI) Ltd
Moving on Music
National Youth Choir of Northern Ireland
New Belfast Community Arts Initiative T/A Community Arts Partnership
NI Opera
North West Play Resource Centre (The Playhouse)
Northern Ireland Piping and Drumming School
Northern Visions Ltd.
Oh Yeah Music Centre
Open Arts
Outburst Arts Festival
Partisan Productions
Poetry Ireland
Prime Cut Productions Ltd
Prison Arts Foundation
Queen Street Studios
Replay Productions Limited
Seacourt Print Workshop Limited
Sole Purpose Productions
Streetwise Community Circus Cic
The Armagh Rhymers Educational & Cultural Organisation
The Belfast Ensemble
The Black Box Trust
The Grand Opera House Trust
The John Hewitt Society
The Lyric Theatre (NI)
The Nerve Centre

The Royal Scottish Pipe Band Association
The Sculptors Society of Ireland CLG
The Ulster Youth Orchestra
Theatre and Dance NI
Thrive Audience Development
Tinderbox Theatre Company
Tyrone Guthrie Centre at Annaghmakerrig
Ulster Orchestra Society Ltd
University of Atypical
Verbal Arts Centre NI Limited
Void Art Centre
Walled City Music Trust
Waterside Theatre Company Ltd
WheelWorks
Young at Art Ltd

National Lottery Project Funded Organisations

Abridged
Accidental Theatre Ltd
An tSnáthaid Mhór Teoranta
Armagh Pipers Club
Artarcadia Ltd
Arts for All
BEAM Creative Network
Belfast Music Society Ltd
Belfast Print Workshop
Belfast Summer School of Traditional Music
Bruiser Theatre Company
C21 Theatre Company Ltd
Charles Wood Festival of Music and Summer School
City of Derry International Choir Festival
Comhaltas Ceoltoiri Eireann
Commedia of Errors
Cumann Culturtha Mhic Reachtain
Festival of Fools Ltd
Fighting Words Northern Ireland
Greater Shankill Partnership Property Dev. Co.
Imagine Belfast Ltd

IMRAM Féile Litríochta Gaeilge
Irish Pages Ltd.
Irish Traditional Music Archive
Jazzlife Alliance
Linen Hall Library
Live Music Now
New Lodge Arts
Newry Chamber Music CIC
North West Carnival Initiative
Northern Lights Project
OBon on the Foyle Festival Group
Open House Festival Ltd
Photo Works North / Source Magazine
Sestina Music Ltd
Sliabh Beagh Arts
Spanner in the Works Theatre Company
St Louise's Comprehensive College
Stage Beyond Theatre Company
Stendhal Festival Ltd
The Brain Injury Foundation
Tumble Circus

Arts Council of Northern Ireland

The MAC
10 Exchange Street West
Belfast, BT1 2NJ
www.artscouncil-ni.org

T: +44 (28) 9262 3555
E: info@artscouncil-ni.org

Alternative formats of this publication may be available on request.
For further information, email: strategy@artscouncil-ni.org