Arts Council NI Annual Funding Survey

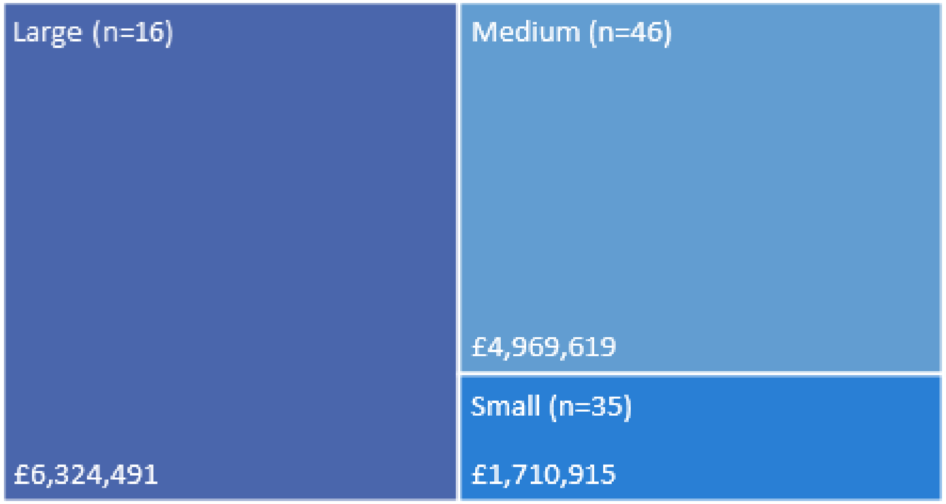
Key Findings from the 2021/22 survey of core funded organisations

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. They 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 2021/22 findings.
- During 2021/22 the arts sector operated in partial lockdown, with theatres and venues only fully opened to the public in Aug 2021.
- **A number of key output tables have been developed in Excel format to compliment this analysis. They can be found here.**
- Several changes were made to this year's survey to ensure data collected remains current and reflects the changing operational characteristics of the portfolio. For further information or analysis of this years findings, contact gstevenson@artscouncil-ni.org

About the 2021/22 portfolio

- 97 organisations received £13m: Large scale organisations received the greatest proportion of this, at 48%.
- There was no change in the portfolio profile.
- £6m (46%) of funding was allocated to 15 organisations based in the most deprived areas of Northern Ireland.



	Number of Organisations	Total Award (£)	Average Award (£)
Music	13	3,361,942	258,611
Drama	12	2,038,374	169,865
Combined Arts	33	4,858,861	147,238
Circus/Carnival	4	408,684	102,171
Visual Arts	15	1,180,953	78,730
Dance	4	298,507	74,627
Literature	5	344,045	68,809
Traditional Arts	11	513,659	46,696

- Combined Arts portfolio received the largest share of funding at the artform level.
- Music organisations received the largest average awards.
- 34% of organisations are classified as Combined Arts.

About the portfolio

Local Authority	Number of Organisations	Average Award (£)	Total Award (£)
Belfast	63	161,344	10,164,649
Derry City and Strabane	13	117,764	1,530,934
Armagh, Banbridge, Craigavon	4	61,370	245,480
Ards and North Down	3	80,878	242,635
Newry, Mourne and Down	3	72,642	217,925
Causeway Coast and Glens	1	138,486	138,486
Lisburn and Castlereagh	2	59,418	118,835
Fermanagh and Omagh	3	37,479	112,437
Mid Ulster	1	36,294	36,294

- The largest share of funding went to organisations with bases in Belfast, followed by Derry City and Strabane.
- A further £197,350 went to resource organisations based in RoI. These organisations have an all-island remit.

- Organisations based in the parliamentary constituency of East Belfast were awarded the highest average awards and share of funding.
- North Belfast received the largest number of awards

	Number of Organisations	Total Award (£)	Average Award (£)
BELFAST EAST	22	5,485,412	249,337
BELFAST NORTH	25	3,186,170	127,447
BELFAST SOUTH	13	1,530,934	117,764
BELFAST WEST	9	889,750	98,861
EAST LONDONDERRY	7	603,317	86,188
FERMANAGH AND SOUTH TYRONE	3	242,635	80,878
FOYLE	3	221,627	73,876
LAGAN VALLEY	3	190,190	63,397
ALL OTHER PCS	8	457,640	425,129

Workforce: overall change compared to previous year

5,036
ALL STAFF
↑ 5%

Pre-pandemic 2018/19
7,465
↓ 33%

CONTRACT

4,178
ALL CONTRACT
↑ 5%

524
FULL-TIME
↑ 65%

3,654
PART-TIME
→ 0%

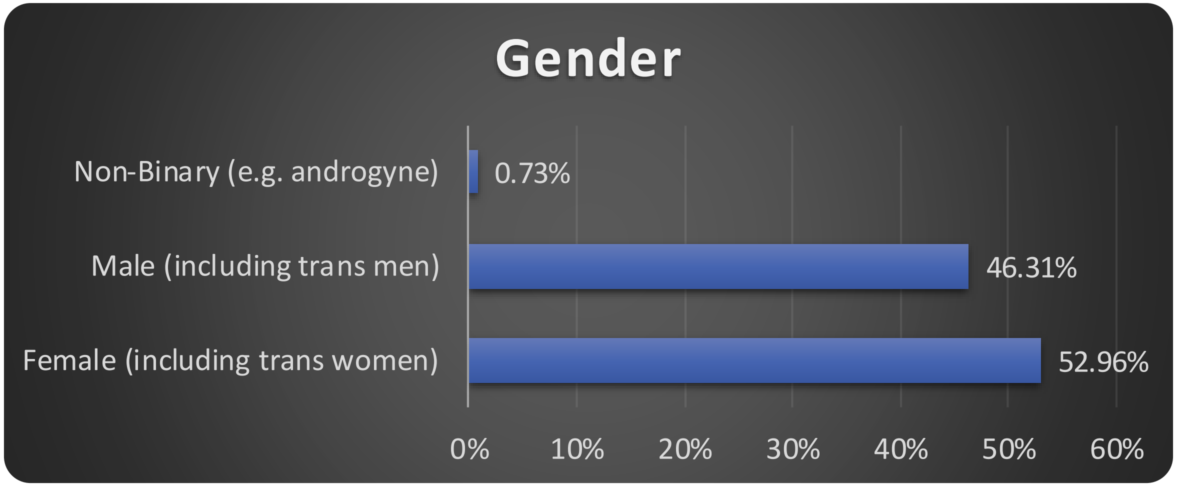
PERMANENT

858
ALL PERMANENT
↑ 2%

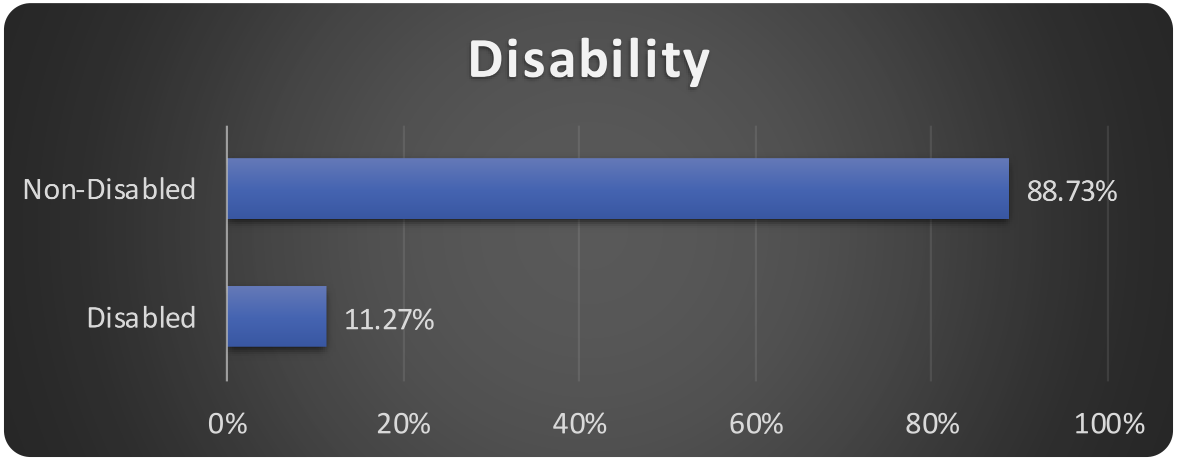
471
FULL-TIME
↑ 2%

387
PART-TIME
↑ 6%

Workforce: gender and disability

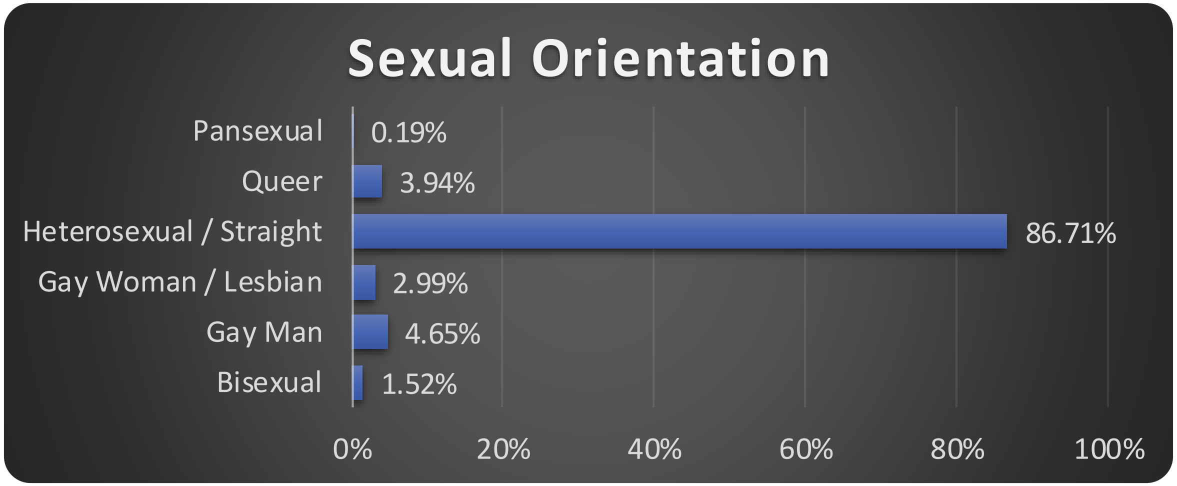


- Females comprised nearly 53% of the overall workforce.
- Two-thirds of those employed in 'specialist' roles were female.

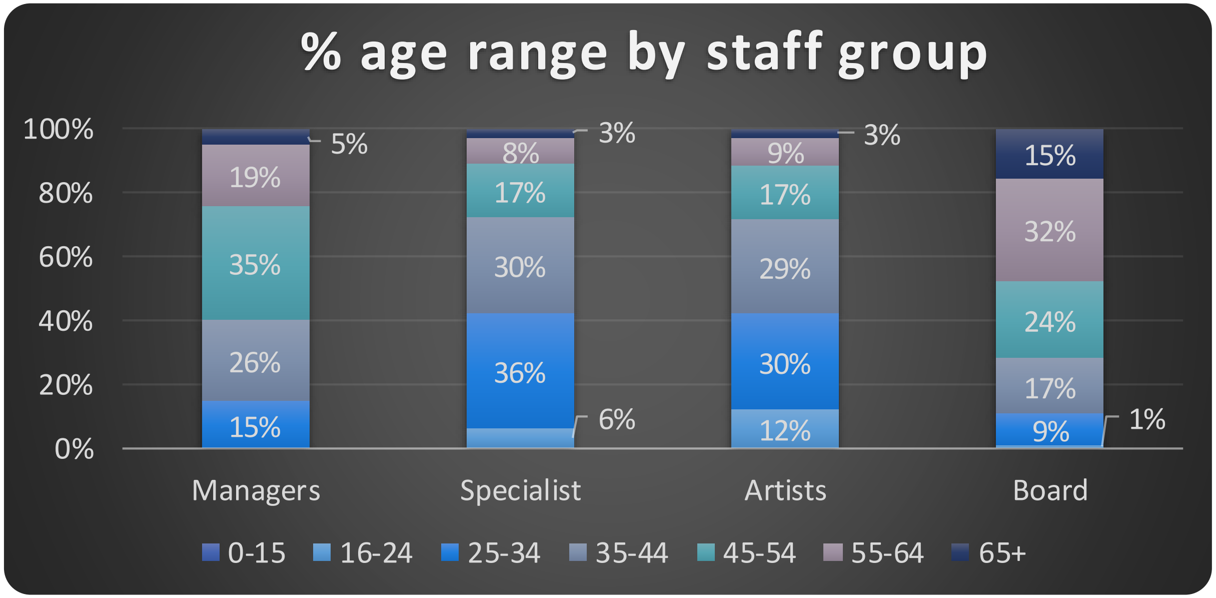


- The proportion of the workforce describing itself as disabled increased by 3 % to 11.27%.
- Fewer staff chose the response option 'prefer not to say'.

Workforce: sexual orientation / age profile

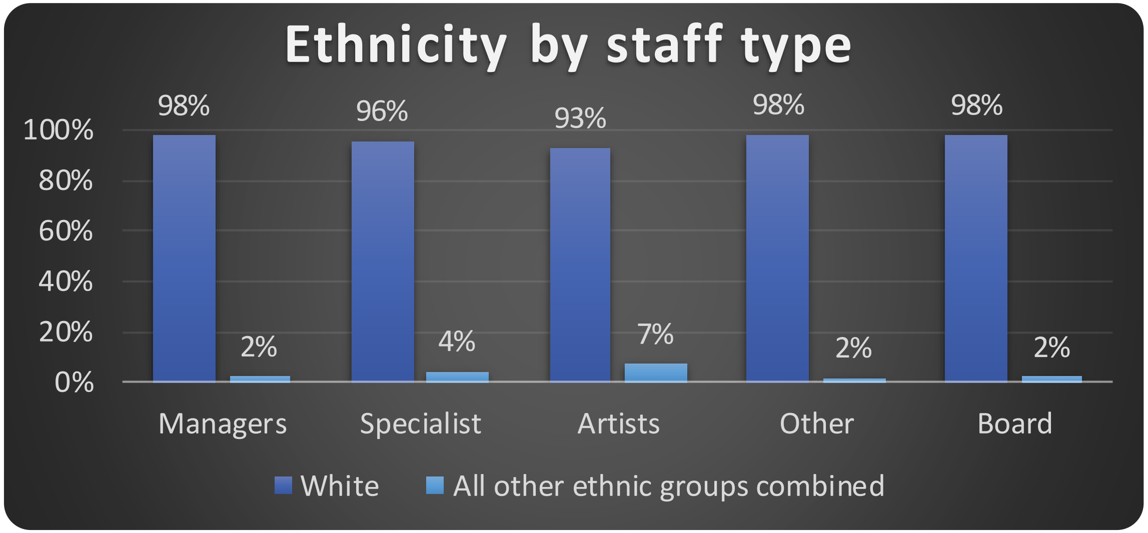


13% of the workforce identified itself as LGBTQ+, an increase of 0.6% on the previous year. Artists were the most diverse group by sexual orientation.



A larger proportion of artists and specialist staff fall within the age ranges 25-34 and 35-44 compared to managers. The proportion of managers aged between 55-64 has increased by 8% compared to 2018/19

Workforce: ethnicity and volunteering



5% of the workforce was from an ethnic minority background.
The category Artists was the most diverse group by employment category, with 7% being from an ethnic minority background.

Number of volunteers	Volunteer hours	Organisations engaging volunteers
1,558	28,511	72
↑ 23%	↑ 35%	↑ 18%

Volunteering increased compared to 2020/21 but levels were still less than half that of pre-pandemic levels. Each individual volunteered an average of 18.2 hours of their time in support of a portfolio organisation.

Finance: earned income sources

arts council of Northern Ireland

Earned income

Inc: box-office; touring; catering and services

2019/20
- £22.8M

2020/21
- 5.1m
- 22% of 2019/20

2021/22
- 16.6m
- 72% of 2019/20

Box Office
£6.6m

- **41% down on 19/20**
- Limited consumer confidence
- Cost of living impact

Professional Services
£3.8m

- **22% up on 19/20**
- Alternative sources leveraged to off-set losses

Bar / Catering
£1.8m

- **33% down on 19/20**
- Closely linked to box-office income / audience numbers

Finance: public income sources

Public Sector

Inc: local authorities, government and sponsorship

2019
- £15.2M

2020
- £19.4m
- 127% of 2019/20

2021
- 19.8m
- 30% increase on 2019/20

NI Govt Dpt, agencies or ALBs

£4.2m

- **27% up on 19/20**
- Legacy of emergency grant supports

Sponsorship

£0.5m

- **55% down on 19/20**
- Smaller audiences attracting fewer commercial sponsors during a year with partial Covid lockdown

Other UK public sources

£3.6m

- **95% up on 19/20**
- Sourcing additional providers to negate earned income losses – creating additional admin. burden

Finance: core costs

Core Costs	2019/20	2020/21	2021/22
	• £24.4M	•£25.4m •104% of 2019/20	•30.0m •23% increase on 2019/20

Salaries
£19.4m

- **24% up on 19/20**
- Inflationary pressure may compound salary costs

Rent and Rates
£1.4m

- **11% up on 19/20**
- Increasing demand for city centre locations driving cost increase

Maintenance and Security
£1.8m

- **66% up on 19/20**
- Aging arts and culture infrastructure

Finance: programme costs

Programme Costs

Inc. artists, volunteering, marketing costs

2019/20
- £28M

2020/21
- £17.4m
- 62% of 2019/20

2021/22
- £22.8m
- 81% of 2019/20

Artists Costs

£11.2m

- **36% down on 19/20**
- Fewer employment opportunities for freelance workers

Marketing Costs

£1.3m

- **19% down on 19/20**
- Efficiency saving and lower production levels

Equipment & Materials

£2.0m

- **13% up on 19/20**
- Increased cost of raw materials

Activity: physical engagement

Number of Activities: Combined number of activities delivered face-to-face by all AFP clients. Relates to: performances, participation based events , exhibitions, festivals and cinema screenings and fact that sector was still in partial lockdown	29,534		
	↓	58%	40,500 fewer compared to pre-pandemic levels (2018/19), in part due to in-year restrictions due to Covid.

Combined public audiences for all activities delivered in 2021/22.	2.2m		
	↓	45%	2.7m fewer compared to pre-pandemic levels (2018/19)

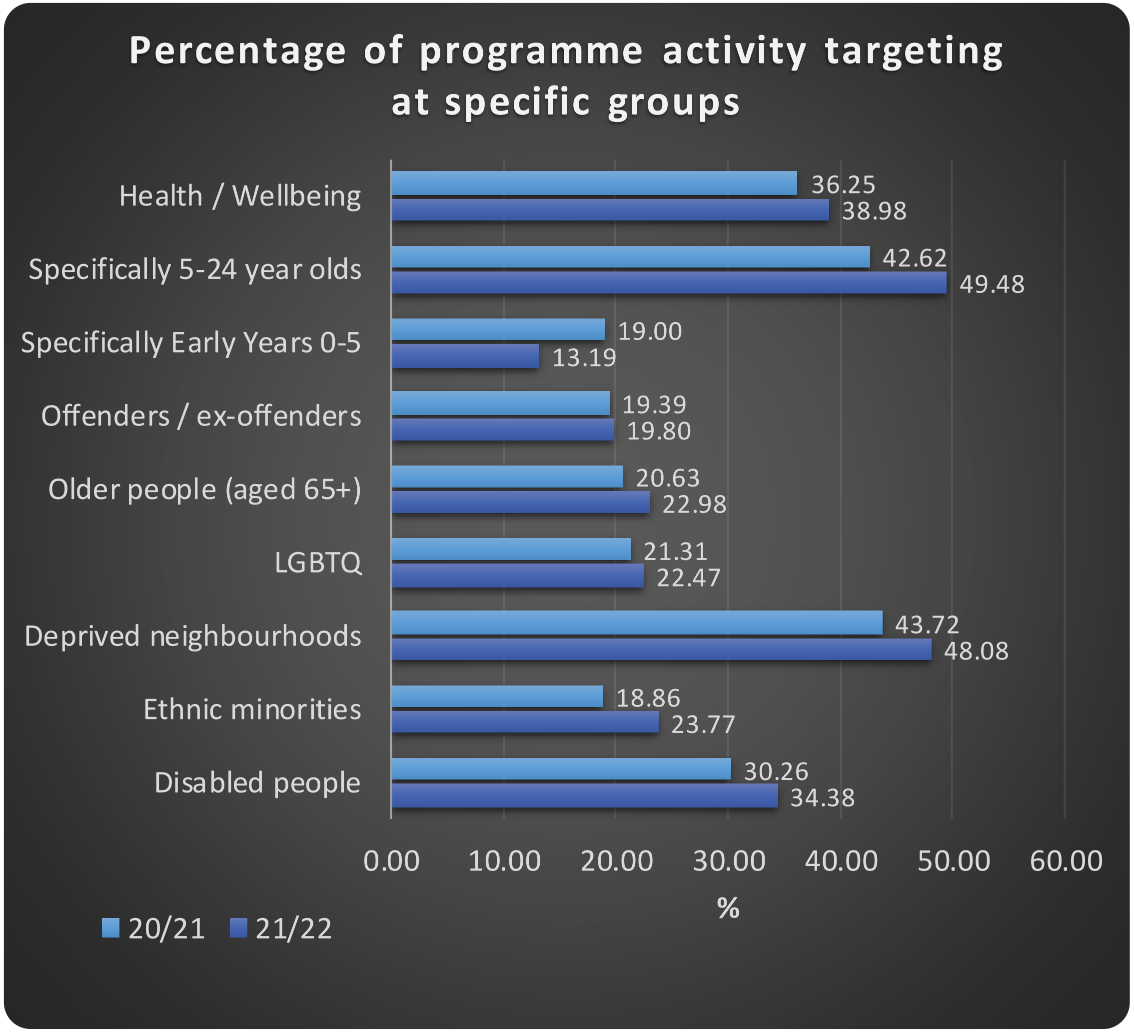
Contact time: face-to-face contact hours between artists and individual(s) delivered within participation based creative contexts. We know the benefits of this increases wellbeing and reduces stress.	282,000 hours	This is a new measure so we have no comparative data yet. The average engagement time per individual was 1.83 hours

Activity: digital output

Use of technologies to deliver live artistic or cultural experiences, or content, in new ways through online and offline environments

Number of new online activities	11,898		
	↑	43%	Proportion of on-line activities grew again in 20/21, compared to the previous year
Number of organisations producing new online activities	69 (71%)		
	↓	3%	Only minor reduction in number of organisations producing on-line content
Number of on-line interactions	7.1m		
	↑	83%	Embedded digital strategies effective at generating more interactions.

Groups targeted



Eight of the 9 specified groups were targeted to a greater extent compared to the previous year. The percentage of programme activity targeted at 'early years' fell by around 6% year-on-year.

Conversely, there was significantly more activity targeted at '5-24 year olds', deprived neighborhoods and disabled people.

Accessibility

Method	Type	Some	Most	All
Communications	Braille	6%	0%	3%
	Large print	16%	10%	6%
	Induction loop	12%	6%	8%
	Captioning	33%	7%	1%
	Audio Description	25%	2%	3%
	BSL interpreter	19%	1%	0%
	ISL interpreter	8%	1%	0%
Physical	Wheelchair access	8%	31%	52%
	Accessible toilets	10%	27%	51%
	Lifts	9%	24%	36%
Navigation	Signage	14%	20%	41%
	Maps	14%	14%	19%
Activity	Relaxed performances	26%	11%	10%
	Dementia friendly	27%	6%	4%
	Multisensory workshops	27%	2%	2%

AFP organisations employ a range of accessibility methods, to create more inclusive spaces for disabled and neurodivergent people.

Physical access methods, in the form of 'wheelchair access' and 'accessible toilets' were reported as provided 'all of the time' by over half of the portfolio. Conversely, communication methods, including captioning and audio-description were only provided by a minority of organisations 'some of the time'.

Engagement

Sector	Engaged	Partnership (e.g. MoU)
Arts Organisations	94%	47%
Local Authories	78%	39%
Libraries	29%	8%
Education	77%	29%
Health and Wellbeing	63%	21%
Criminal Justice	12%	6%
Heritage	45%	15%
Museums	36%	11%
Community Groups	81%	33%
Regeneration	34%	10%

AFP clients engage organisations based within a diverse range of settings – helping to unlock career opportunities, amplify messaging and enhance personal outcomes.

The extent of deeper, partnership working, evident particularly with local authorities (39%), community groups (33%) and within health and wellbeing settings (21%) demonstrates the value placed by these organisations on cultural experiences to enhance their work.

Background Notes

- Deprivation is defined based on the Noble Indices of Deprivation (2017) with location defined by each organisations administrative base. Excludes organisations based outside Northern Ireland
- Organisation 'size' is a financial income related classification, determined based on total income for a given year. As income often changes each year, there are often changes in the number of organisations associated with each income range. The classifications are: small (less than £200,000), medium (between £200,000 and £800,000), and large size (over £800,000).
- Although organisations have their administrative bases in Belfast, many tour work, collaborate and partner organisations in other parts of Northern Ireland.
- Workforce charts exclude responses 'prefer not to say' and 'not known'. See tables for full response breakdown
- Combined public audiences includes known (where the exact number of people attending and event known) and estimated counts (where audiences are estimated).