



HEADLINE FINDINGS FROM THE 2019/20 ANNUAL FUNDING SURVEY OF CORE ARTS ORGANISATIONS

Arts Council of Northern Ireland

January 2021

About the 2019/20 survey

The Arts Council of Northern Ireland is the main support for artists and arts organisations, offering a broad range of funding opportunities through our Exchequer and National Lottery funds. The Annual Funding Programme (AFP) is a grant administered to key clients each year and aims to support Northern Ireland's arts infrastructure through grants to organisations working across all art forms and practices.

Organisations in receipt of funding from the Annual Funding Programme (AFP) from the Arts Council of Northern Ireland, are required to complete an annual survey on the activity they deliver, their workforce composition and income and expenditure for the relevant year.

This report provides a high level summary of outputs in each of these areas for the financial year 2019/20. A number of key output tables have been developed in Excel format to compliment this analysis, they can be found on the Arts Council website.

The data collected provides the Arts Council and its key partners with intelligence to enhance sector support, inform funding applications and monitor its own Five Year Plan: *Inspire, Connect, Lead (2019 to 2024)*.

The enforced lockdown in March 2020, the consequence of the COVID-19 Pandemic, had a significant impact on activity levels that month and had a knock-on effect in other areas of reporting including finance and employment. This impact can be seen in some of the high level outcomes reported here.

In response to the changing methods of engagement developed, at speed, by core funded organisations in 2020/21, a number of changes have been made to the survey questions for next year. The updated survey was circulated to all organisations in May 2020 and will be reported back to the Arts Council at the end of the 2020/21 financial year.

All 97 organisations in receipt of AFP funding in 2019/20 completed the survey. An additional five organisations, transitioning out of the portfolio are not included in this analysis. Organisations participating in the survey are listed in Appendix 1. A total of £12.8m was awarded in funding to these organisations.

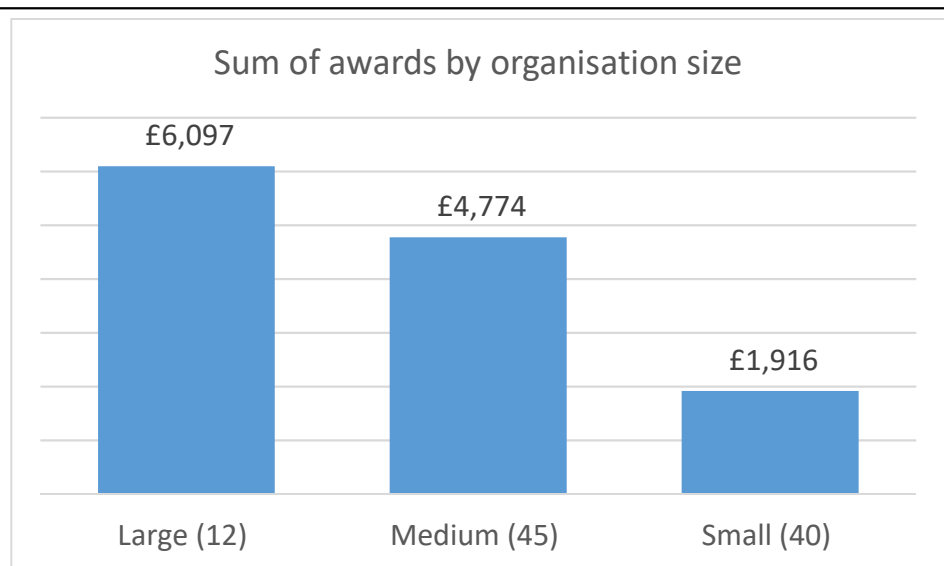
In a number of instances, it has been necessary to exclude extreme responses to ensure trends displayed are an accurate reflection of the portfolio. Referred to as outliers, these figures have been removed as they obscure patterns and trends in the data.

In addition to artform, each organisation is classified by size. This is a key income related variable that helps us compare and contrast outputs and is 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).

To ensure trends are as accurate as possible, a constant sample of 93 organisations has been used.

For further information and support interpreting this year's data please contact g.stevenson@artscouncil-ni.org.

Funding Summary

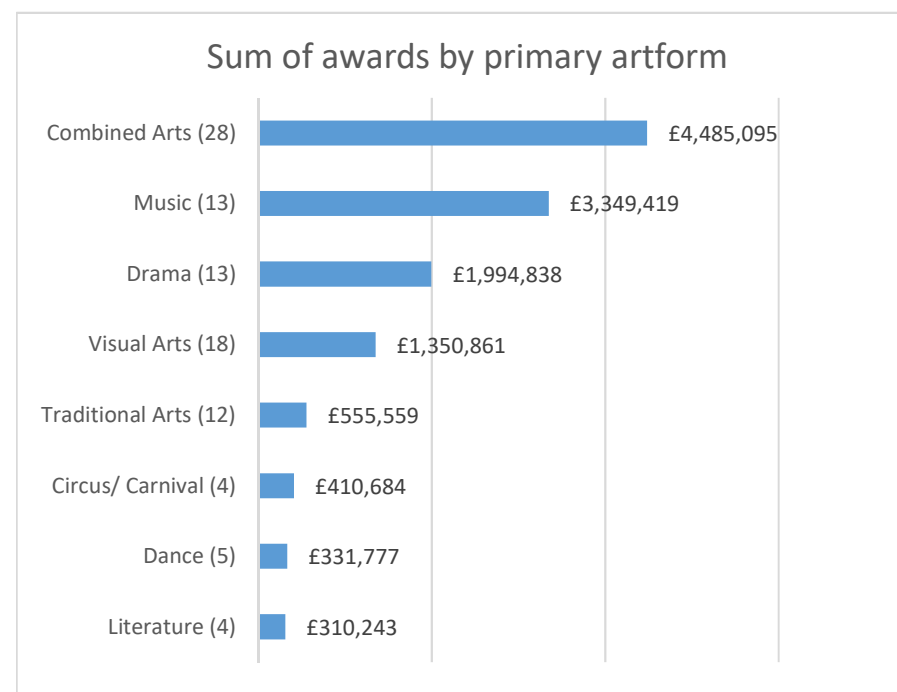


Large scale organisations (those generating more than £800k in income), received 48% of the total grant fund in 2019/20. On average, each of the 12 organisations in this category received just over £500k each.

The 40 organisations categorised as 'small' scale (generating less than £200k in income), received 15% of the total grant fund. On average, each of these organisations received £47k.

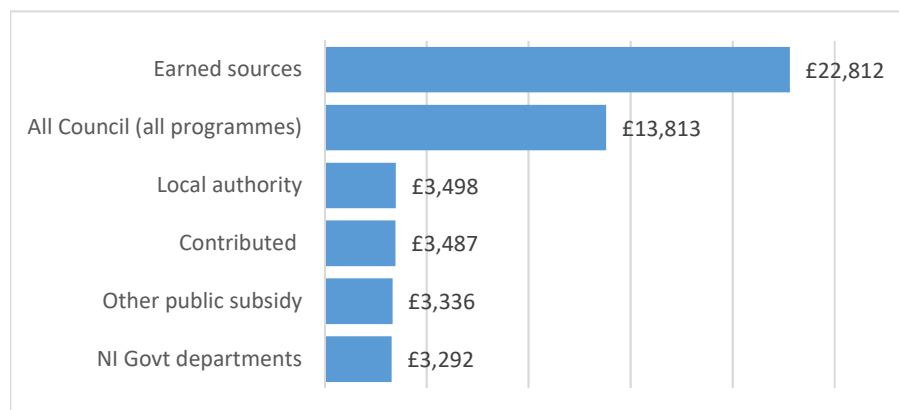
Twenty eight organisations were classified under the combined arts discipline, more than twice the number of music (13) and drama (13) based organisations. These organisations received a total of £4.5m, the largest proportion of the 2019/20 funding. That equated to an average of £160,181 per organisation.

Music organisations received average awards of £257,647, the largest of all artform areas.



Finances

2019/20 income categories and totals (£000's)

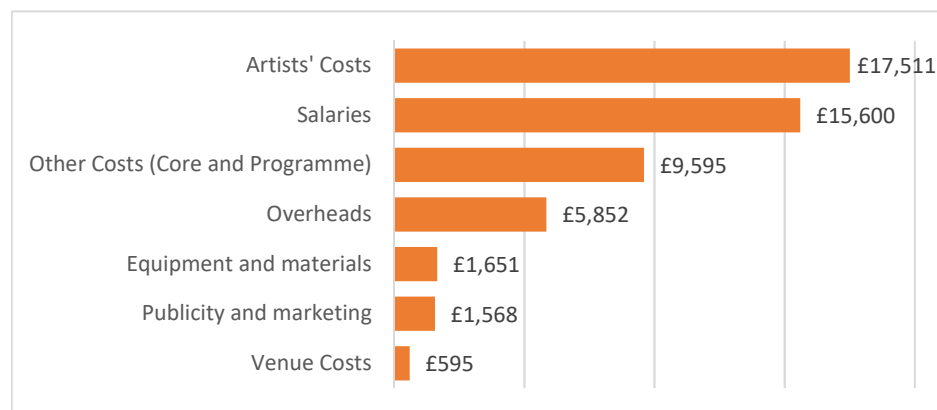


Income totalled £50.2m and fell by £3.4m compared to 2018/19.

Earned income generated £22.8m, representing 45% of all income sources. This represents a reduction of 10% compared to the previous year, and is likely to be, in part, consequence of the March lockdown, the result of the COVID-19 pandemic.

Income sourced from NI government departments continues to fall year-on-year. It fell by 6.5% in 2019/20 to £3.3m.

2019/20 expenditure categories and totals (000's)

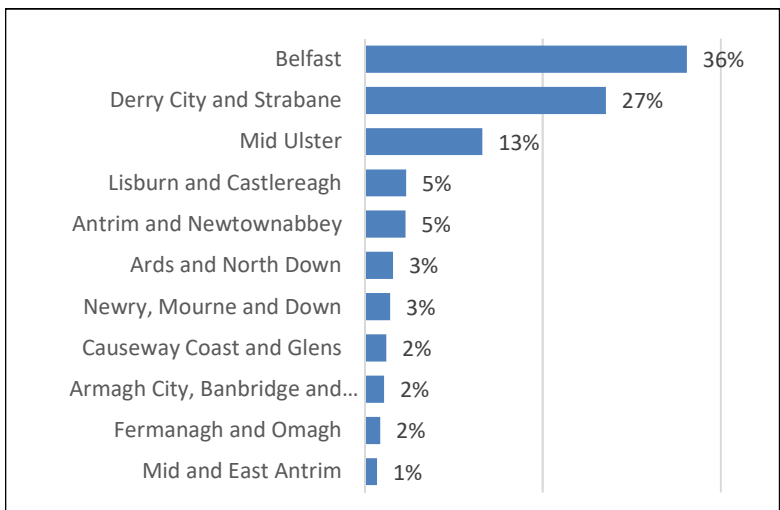


Expenditure totalled £52.3m, with organisations continuing to offset shortfalls in income by keeping expenditure as low as possible.

Compared to last year and based on the constant sample of 93 organisations, there were reductions in expenditure in three categories: artists costs (-7%), equipment and materials (-17%) and venue costs (-16%).

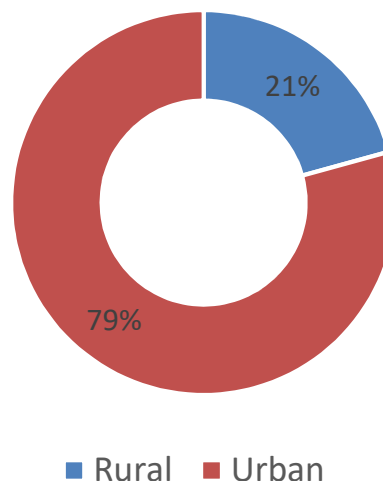
There was a marginal decrease in year-on-year expenditure of £139k and an overall portfolio deficit of £1.9m for this operating period.

Activity: half of all NI activity was delivered in the top 10% most deprived Multiple Deprivation Measure (2017)



Nearly two-thirds of activity (63%) was delivered in either Belfast or Derry City and Strabane LGD's. Outside these two areas, there was a year-on-year decrease of 8% in activity levels across all LGD's.

Distribution of activity by urban / rural classification

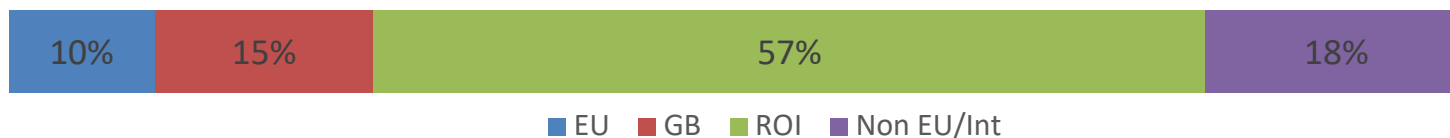


The majority of activity was delivered in urban (79%) compared to rural (21%) areas; reflecting the location of fixed arts based venues across Northern Ireland.

The proportion of activity delivered in rural areas increased compared to the previous year by 4%.

9% of all activity was delivered outside Northern Ireland. This was delivered by 45 clients in 15 countries.

Activity location outside Northern Ireland



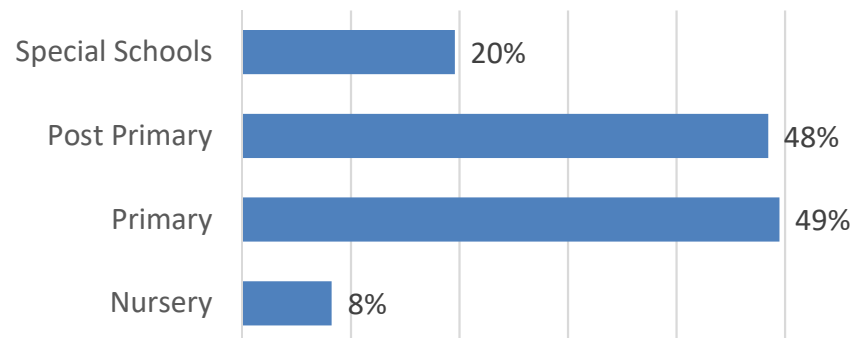
School based activity: 2,960 activities (performances, participation based events and exhibitions) were delivered in schools during 2019/20.

Number of activities delivered by AFP clients in 2019/20

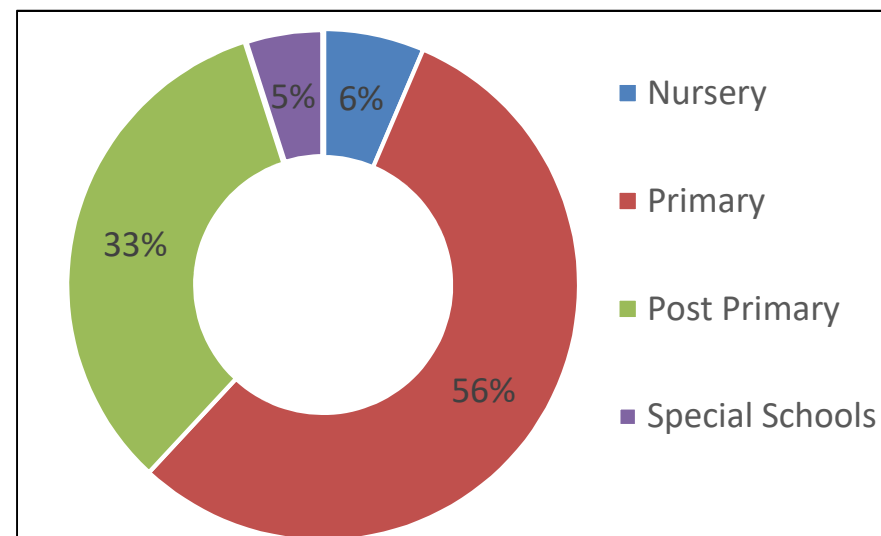


59% of clients delivered activities in schools. Most worked in primary and post primary schools but a significant proportion (20%) delivered activity in special schools, providing support for children with educational needs.

% of clients visiting schools (by type)



AFP clients visited 407 unique schools across Northern Ireland, mainly in urban areas. 56% were primary schools, with a further 33%, post primary schools.



10 organisations delivered over 50% of all school based activities...

AFP Client	Visits	Activities
Source Magazine	67	67
The Lyric Theatre (NI)	60	62
Community Arts Partnership	58	230
Kids in Control	44	106
Poetry Ireland	41	84
Ulster Youth Choir	41	41
Verbal Arts Centre NI Limited	30	256
Ulster Orchestra Society Ltd	28	393
Young at Art Ltd	28	86
All Set Cross Cultural Project	27	170

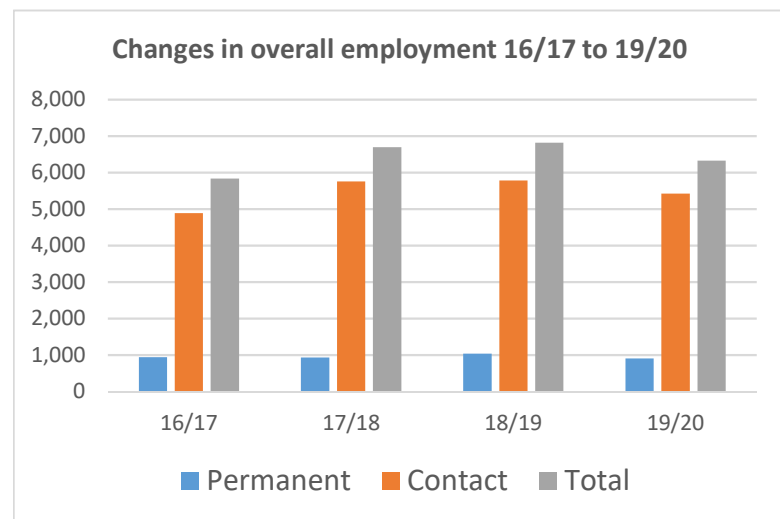
The overall number of visits made by funded clients to schools fell by a quarter compared to the previous year, with nurseries and special schools most affected.

This is likely, in part, to be due to the enforced school lockdown, the consequence of the COVID-19 pandemic.

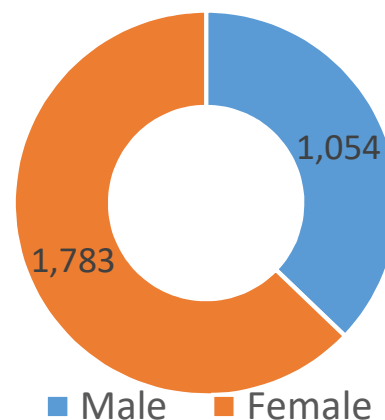
Employment: AFP funded clients employed 6,409 people in 2019/20, a 7% reduction compared to the previous year.

There were reductions in employment across all category types, with the number of managers, employed on a contract basis, falling by over 10%.

Most of the workforce were employed on a contract basis: for every one person in a permanent role, there were 6 employed on a contract basis.



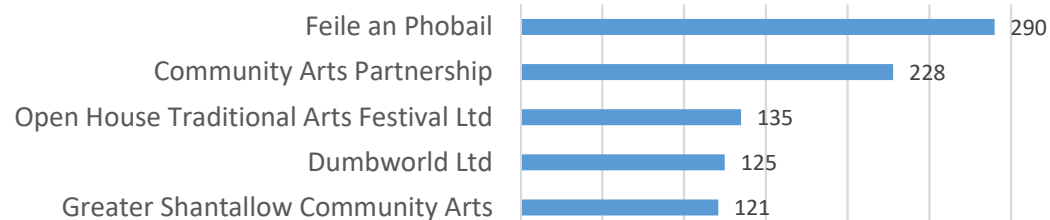
Volunteering



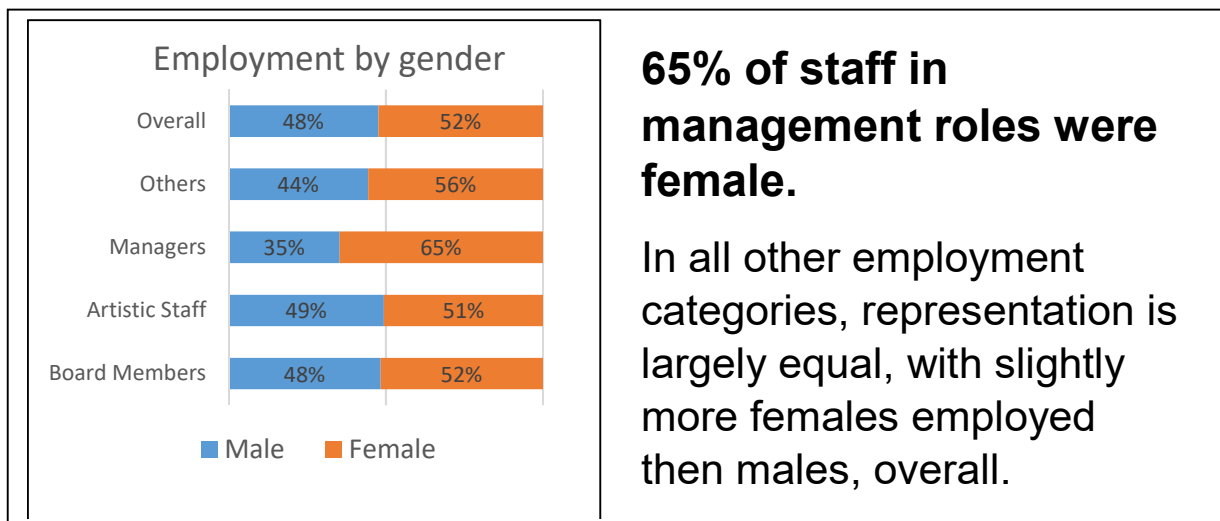
AFS volunteer numbers fell by 20% compared to the previous year; male volunteers fell by a quarter.

Despite this, the number of hours spent volunteering increased to 72,745. This resulted in an overall increase in the average number of volunteer hours from 21 to 26 per person

Top recruiting organisations

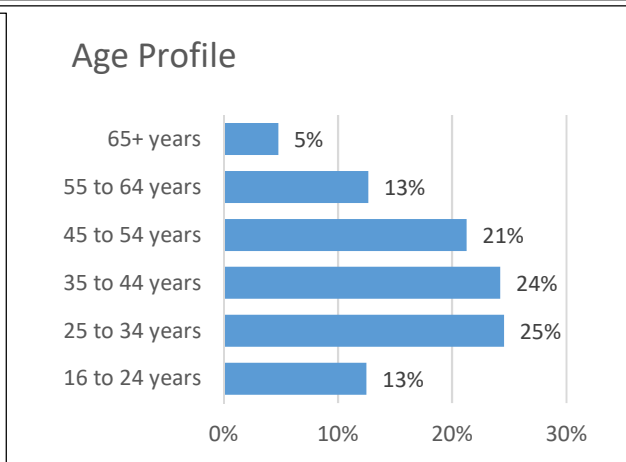


Diversity: Only 1% of the AFP workforce was from a minority ethnic background in 2019/20

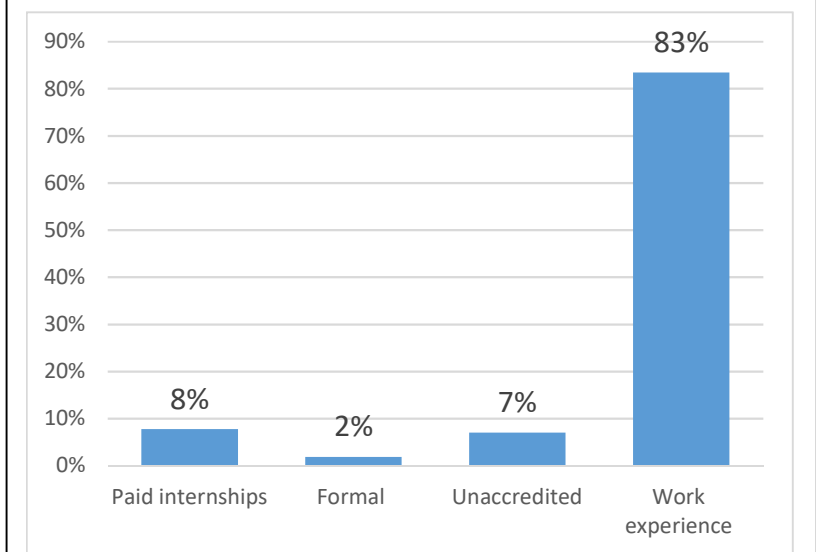


Half of the workforce was aged between 25 to 44. Young people are particularly well represented amongst artistic staff.

Over the past four years, the proportion of younger people aged 16 to 24 and older people aged 65+ working for AFP clients has fallen, sharply.



Apprenticeships: 271 apprenticeships were taken on in 2019/20. 83% involved work experience, with only 2% formal apprenticeships.



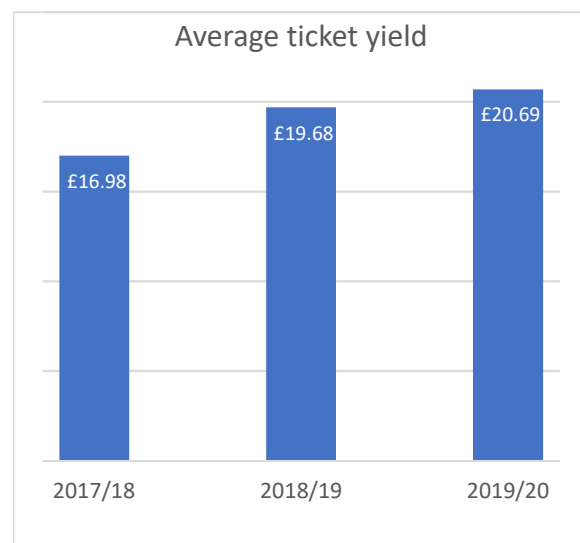
Recruitment of all types of apprenticeships have fallen over the past four years by 51% with the exception of 'unaccredited apprenticeships', which has seen a slight uplift. The number of paid internships and formal apprenticeships have seen the largest decline over this period.

Activity: There were an estimated 6.2m individual engagements with AFP organisations in 2019/20 via performances, participation based events, visual art exhibitions and festivals.

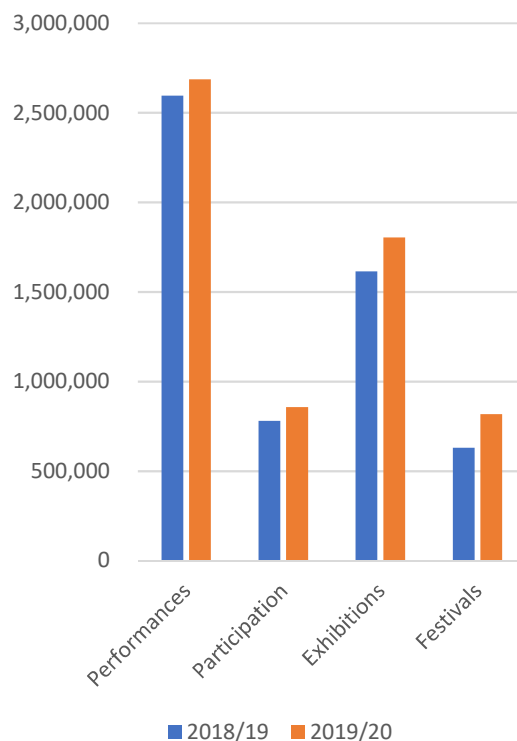
Ticketing: Overall ticket yield for 2019/20 stood at £14m, a slight fall compared to the previous year.

Average ticket yield continues to increase each year and now stands at £20.69.

The number of concessionary tickets distributed fell (as a proportion of tickets available) from 16% to 11%.



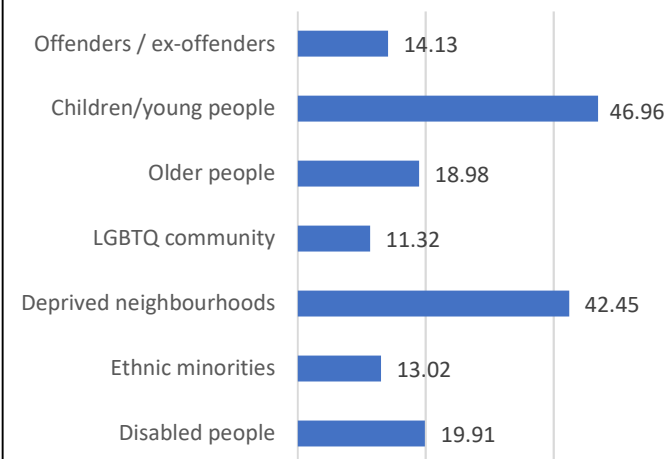
Changes in engagement between 18/19 and 19/20



The number of activities delivered by AFP organisation increased by 10% overall, compared to the previous year.

Each activity area saw double digit increases in engagement with the exception of performances where audiences grew by a more modest 4% over the same period.

% activity targeted at specific groups



Appendix 1 – 2019/20 AFP Organisations

Organisation	Scale	Primary Artform
Aisling Ghear Theatre Company	Small	Drama
All Set Cross Cultural Project	Small	Traditional Arts
An Droichead	Medium	Traditional Arts
An Gaelaras Ltd	Large	Traditional Arts
Andersonstown Traditional & Contemporary Music School	Small	Traditional Arts
Array Studios	Small	Visual Arts
Arts & Business Northern Ireland	Medium	Combined
Arts Care	Medium	Visual Arts
ArtsEkta	Medium	Combined
Beat Carnival	Medium	Circus/Street Theatre/Carnival
Belfast Community Circus School	Medium	Circus/Street Theatre/Carnival
Belfast Exposed Photography	Medium	Visual Arts
Belfast International Arts Festival	Medium	Combined
Belfast Music Society	Small	Music
Belfast Print Workshop	Small	Visual Arts
BelfastTrad (Traditional Music and Dance Society)	Small	Traditional Arts
Big Telly Theatre Company	Medium	Drama
Cahoots NI Ltd	Medium	Drama
Camerata Ireland	Medium	Music
Catalyst Arts Ltd	Small	Visual Arts
Cathedral Quarter Arts Festival	Medium	Combined
Centre for Contemporary Art Derry - Londonderry	Small	Visual Arts
Comhaltas Ceoltoiri Eireann	Medium	Traditional Arts
Craft and Design Collective	Medium	Visual Arts

Organisation	Scale	Primary Artform
Creative Exchange	Small	Visual Arts
Crescent Arts Centre	Large	Combined
Cultúrlann McAdam Ó Fiaich	Medium	Combined
Dance Resource Base (NI) Ltd	Small	Dance
Derry Theatre Trust	Large	Combined
Digital Arts Studios	Small	Visual Arts
Down Community Arts Ltd	Small	Combined
Drake Music Project Northern Ireland	Small	Music
DU Dance	Small	Dance
Dumbworld Ltd	Medium	Music
Dun Uladh Ltd	Small	Traditional Arts
Dylan Quinn Dance Theatre	Small	Dance
EastSide Arts	Medium	Combined
Echo Echo Dance Theatre Company	Medium	Dance
Feile an Phobail	Large	Combined
Flaxart Studios	Small	Visual Arts
Glasgowbury	Medium	Combined
Golden Thread Gallery	Medium	Visual Arts
Greater Shantallow Community Arts	Medium	Combined
In Your Space (NI) Ltd	Medium	Circus/Street Theatre/Carnival
Irish Pages Ltd.	Small	Literature
Irish Traditional Music Archive	Medium	Traditional Arts
Kabosh Theatre Ltd	Medium	Drama
Kids in Control	Small	Drama
Maiden Voyage (NI) Ltd	Small	Dance
Millennium Court Arts Centre	Small	Visual Arts

Organisation	Scale	Primary Artform
Moving on Music	Medium	Music
Community Arts Partnership	Medium	Combined
NI Opera	Large	Music
The Playhouse	Large	Combined
Northern Ireland Piping & Drumming School	Small	Traditional Arts
Northern Visions Ltd.	Medium	Combined
Oh Yeah Music Centre	Medium	Music
Open Arts	Small	Combined
Open House Traditional Arts Festival Ltd	Medium	Traditional Arts
Panarts	Small	Music
Partisan Productions	Small	Drama
Source Magazine	Small	Visual Arts
Play Resource Warehouse	Medium	Visual Arts
Poetry Ireland	Small	Literature
Prime Cut Productions Ltd	Medium	Drama
Prison Arts Foundation	Small	Combined
QSS @ Bedford Street	Small	Visual Arts
Replay Productions Limited	Medium	Drama
Seacourt Print Workshop Limited	Small	Visual Arts
Sole Purpose Productions	Small	Drama
Spanner in the Works	Small	Drama
Sticky Fingers Arts	Medium	Combined
Streetwise Community Circus Workshops	Small	Circus/Street Theatre/Carnival
Armagh Rhymers Educational & Cultural Organisation	Small	Traditional Arts
The Black Box Trust	Medium	Combined
The Grand Opera House Trust	Large	Combined

Organisation	Scale	Primary Artform
The John Hewitt Society	Small	Literature
The Lyric Theatre (NI)	Large	Drama
The MAC	Large	Combined
The Nerve Centre	Large	Music
The Royal Scottish Pipe Band Association	Small	Traditional Arts
Visual Artists Ireland	Medium	Visual Arts
The Void Art Centre	Medium	Visual Arts
TheatreNI	Small	Drama
Thrive	Medium	Combined
Tinderbox Theatre Company	Small	Drama
Tyrone Guthrie Centre at Annaghmakerrig	Medium	Combined
Ulster Orchestra Society Ltd	Large	Music
Ulster Youth Choir	Small	Music
Ulster Youth Orchestra	Small	Music
Ulster-Scots Community Network	Medium	Combined
University of the Atypical	Medium	Combined
Verbal Arts Centre	Large	Literature
Walled City Music Trust	Medium	Music
Waterside Theatre Company Ltd	Medium	Combined
Wheelworks	Medium	Combined
Young at Art	Medium	Combined