HEADLINE FINDINGS FROM THE 2020/21 ANNUAL FUNDING SURVEY OF CORE ARTS ORGANISATIONS

Arts Council of Northern Ireland
November 2021
About the 2020/21 survey characteristics

The Arts Council of Northern Ireland (ACNI) 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 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 the 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) are required to complete an annual survey detailing information on their finances, workforce composition and activity. This year, there was an additional section looking at the impact COVID-19 has had on their operations.

This report provides a high level summary of outputs in each of these areas for the financial year 2020/21. A number of key output tables have been developed in Excel format to complement this analysis. They can be found here.

The enforced lockdown in March 2020 and subsequent restrictions had a huge impact on the operation and management of all core funded clients, with many organisations having to develop new business models to reflect changes to their operating environments. The results of these changes, for example the shift from in-person to digital forms of output, are reported here.

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 primary artform, each organisation is classified by size. This is a key income-related variable that helps us compare and contrast outputs; it is determined based on total income for a given year and is used widely in this report. 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 (over £800,000).
In response to the changing methods of engagement developed, at speed, by core funded organisations as a result of the COVID-19 pandemic, a number of changes were made to the survey. This updated survey was circulated to all organisations in May 2020. All 97 organisations in receipt of AFP funding in 2020/21 completed the survey.

The main changes made to the survey were:

1. The survey was reduced from 6 to 4 sections.
2. We no longer require organisations to complete a narrative section, describing project level activity.
3. We added a ‘specialist staff’ employment category to reflect the change in skills organisations are recruiting.
4. We extended workforce employment descriptors to reflect changes in gender identity and sexual orientation classification. They now apply to all employment areas, including board members.
5. New (minor) income and expenditure categories have been added to reflect the greater diversification in income and expenditure.
6. We now ask organisations to estimate the extent of face-to-face contact hours spent delivering participation work and provide details of digital output.
7. To reflect the variety of access needs organisations provide to people with disabilities, we have refined our accessibility question.

If you have any further questions relating to the revised survey please e-mail either gstevenson@artscouncil-ni.org.
About the portfolio: 97 organisations received £12.9m in grants

Small-scale organisations (those generating less than £400k in income), received 16% of funding. On average, each of these 39 organisations received £53,050 in support.

The 14 organisations categorised as ‘large’ scale (generating more than £800k in income), received 48% of the total grant fund. On average, each of these organisations received £444k each.

Thirty-three organisations were classified under the Combined Arts discipline, more than twice the number of music (13) and drama (12) based organisations. These organisations received a total of £4.8m, the largest proportion of the 2020/21 funding. That equated to an average of £146,530 per organisation.

Belfast-based organisations received 78% of funding allocated, with those based in Derry City and Strabane, 12% and all other Local Government Districts 10%. Data relates to the location of administrative ‘home bases’ only, not the location at which activities were delivered.
Finance: emergency COVID-19 funding provided short-term relief for some organisations

Income fell by 9% (£4.5m) compared to 2019/20. Large- and small-scale organisations saw income fall by 17%. Medium-scale organisations saw a slight increase in income.

Earned income fell by £16m (69%) compared to 2019/20. This loss was offset, to an extent, by increases in income from public sources and contributed sources, both of which increased by 22%. Large falls in both earned and public income for small-scale organisations place these groups under particular stress.

The inability of core funded organisations to programme work extensively saw associated expenditure fall by £10.5m (61%) – impacting their ability to generate vital income.

Year-on-year, core costs increased slightly, by 4%. Large-scale organisations saw the biggest rise in associated costs (£1.3m). Small-scale organisations saw a marginal £340k decrease in core costs. Rising by 60% over the last 12 months, literature based organisations saw the largest percentage increase in these costs.
Workforce: there were 4,800 people employed in the core funded arts sector in 2020/21

All Staff: 4,800
Permanent staff: 830
-25%

Contract/freelance: 3,970
-27%

Permanent staff: 830
-9%

Compared to 2019/20

10%*: The proportion of workforce aged between 16 and 24

85%*: The proportion of workforce describing their sexual orientation as heterosexual or straight

52%*: The proportion of workforce whose gender identity was female (including trans women)

5%*: Proportion of workforce whose ethnicity was from a Black, Asian and Minority Ethnic (BAME) background

8%*: Proportion of the workforce reported as having a disability or impairment

*% excludes ‘not known’ and ‘prefer not to say’
Activity: The combined audiences for online and digital activity in 2020/21 was an estimated 15m

The number of physical (in person) activities recorded in 2020/21. There were 67,900 the previous year.

**Digital activity**: this relates to the use of technologies to deliver artistic or cultural experiences in new ways through online or offline environments. 99% of activity delivered was delivered via online platforms, with the remaining 1% delivered via the mediums of screenings, television or radio. These audiences are additional to those described for online interactions and relates to activity originally designed for a different medium initially, then made available online. Audiences of 8.1m were reached by digital means during 2020/21.

**Online interactions**: this newly defined classification of activity reflects the total audience for products designed specifically for online consumption. 3.9m online interactions were delivered by core funded clients during 2020/21. Combined arts organisations reached the largest proportion of audiences, an estimated 2.2m

**Digital engagement ('000)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Digital engagement ('000)</th>
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<tbody>
<tr>
<td>Total</td>
<td>8,105</td>
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<tr>
<td>Combined Arts</td>
<td>3,736</td>
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<tr>
<td>Music</td>
<td>2,321</td>
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<tr>
<td>Visual Arts</td>
<td>657</td>
</tr>
<tr>
<td>Drama</td>
<td>570</td>
</tr>
<tr>
<td>Traditional Arts</td>
<td>361</td>
</tr>
<tr>
<td>Literature</td>
<td>190</td>
</tr>
<tr>
<td>Dance</td>
<td>173</td>
</tr>
<tr>
<td>Circus/Carnival</td>
<td>98</td>
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<table>
<thead>
<tr>
<th>Category</th>
<th>Online interactions ('000)</th>
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<tr>
<td>Total</td>
<td>3,930</td>
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<tr>
<td>Combined...</td>
<td>2,204</td>
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<tr>
<td>Music</td>
<td>533</td>
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<tr>
<td>Visual Arts</td>
<td>613</td>
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<tr>
<td>Drama</td>
<td>252</td>
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<tr>
<td>Traditional...</td>
<td>235</td>
</tr>
<tr>
<td>Circus/Carn...</td>
<td>82</td>
</tr>
<tr>
<td>Dance</td>
<td>63</td>
</tr>
<tr>
<td>Literature</td>
<td>47</td>
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</tbody>
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116,723: The number of participation-based contact hours delivered in person and virtually by core funded clients.
Income generated from ticket sales in 2020/21. A reduction of 99% compared to the previous year.

Percentage of clients using dedicated measures to improve accessibility. See tables for more information on the extent of support provided.
Appendix 1 – 2020/21 AFP Organisations

Aisling Ghéar Theatre Company
All Set Cross Cultural Project
An Droichead
An Gaelaras Ltd
Andersonstown Traditional & Contemporary Music School
Array Studios
Arts & Business Northern Ireland
Arts Care
Arts Ekta
Beat Carnival
Belfast Community Circus School
Belfast Exposed Photography
Belfast International Arts Festival
Belfast Music Society
Belfast Print Workshop
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
Comhaltas Ceoltóirí Éireann
Craft Northern Ireland
Creative Exchange
Crescent Arts Centre
Cultúrlann McAdam Ó Fiaich
Derry Theatre Trust
Digital Arts Studios
Down Community Arts Ltd
Drake Music Project Northern Ireland
DU Dance
Dumbworld
Dun Uladh Ltd
Dylan Quinn Dance Theatre
EastSide Arts
Echo Echo Dance Theatre Company
Féile an Phobail
Flax Art Studios
Glasgowbury
Golden Thread Gallery
Greater Shantallow Community Arts
In Your Space Circus Ltd
Irish Pages Ltd.
Irish Traditional Music Archive
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 & Drumming School
Northern Visions Ltd.
Oh Yeah Music Centre
Open Arts
Open House Festival
Outburst Arts Festival
Panarts
Partisan Productions
Photo Works North / Source Magazine
Play Resource Warehouse
Poetry Ireland
Prime Cut Productions Ltd
Prison Arts Foundation
Queen Street Studios
Replay Productions Limited
Seacourt Print Workshop Limited
Sole Purpose Productions
Spanner in the Works
Sticky Fingers Arts
Streetwise Community Circus
The Armagh Rhymers Educational & Cultural Organisation
The Black Box Trust
The Duncairn/174 Trust
The Grand Opera House Trust
<table>
<thead>
<tr>
<th>The John Hewitt Society</th>
<th>Theatre and Dance NI</th>
<th>University of Atypical</th>
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<tbody>
<tr>
<td>The Lyric Theatre (NI)</td>
<td>Thrive Audience Development</td>
<td>Verbal Arts Centre NI Limited</td>
</tr>
<tr>
<td>The MAC</td>
<td>Tinderbox Theatre Company</td>
<td>Walled City Music Trust</td>
</tr>
<tr>
<td>The Nerve Centre</td>
<td>Tyrone Guthrie Centre at Annagmakerrig</td>
<td>Waterside Theatre Company Ltd</td>
</tr>
<tr>
<td>The Royal Scottish Pipe Band Association</td>
<td>Ulster Orchestra Society Ltd</td>
<td>Wheelworks</td>
</tr>
<tr>
<td>The Sculptors Society of Ireland T/A Visual Artists Ireland</td>
<td>Ulster Youth Orchestra</td>
<td>Young at Art Ltd</td>
</tr>
<tr>
<td>The Void Art Centre</td>
<td>Ulster-Scots Community Network</td>
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