

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).

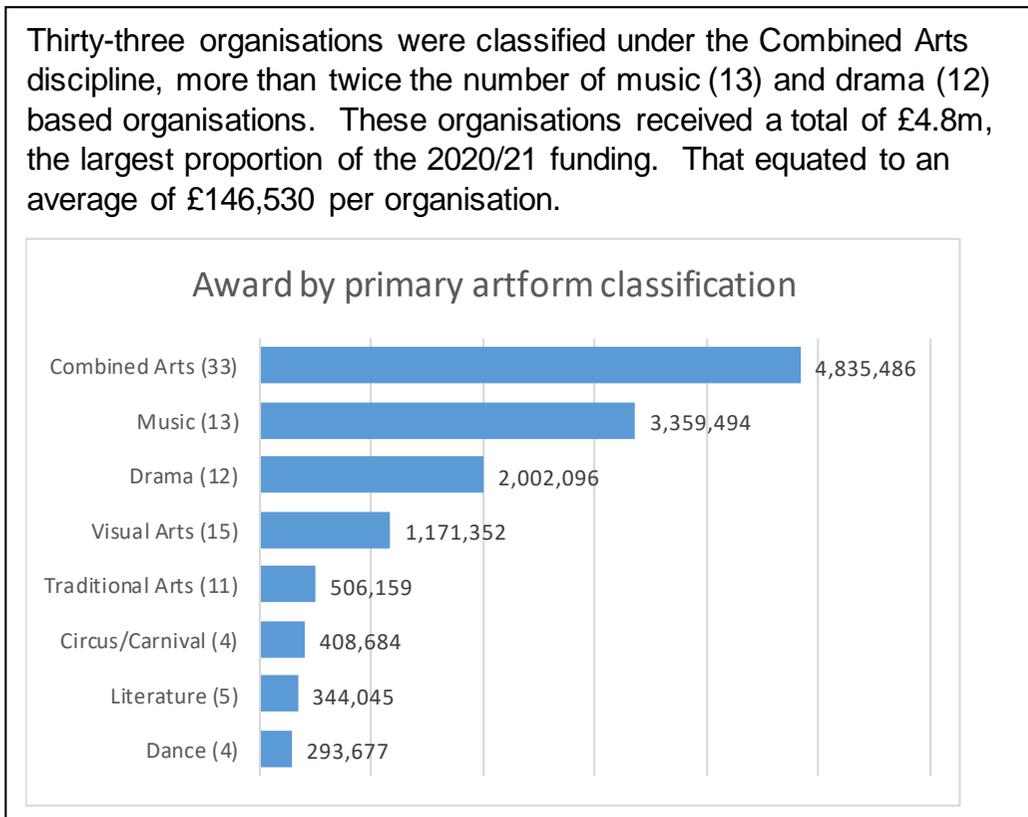
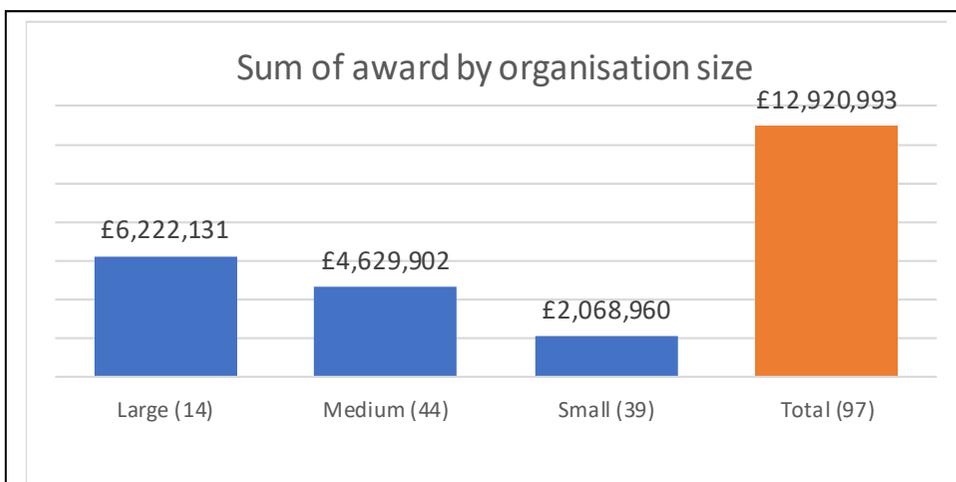
In response to the changing methods of engagement developed, at speed, by core funded organisations as a result of the COVID-19 pandemic, a number of changes were made to the survey. This updated survey was circulated to all organisations in May 2020. All 97 organisations in receipt of AFP funding in 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.

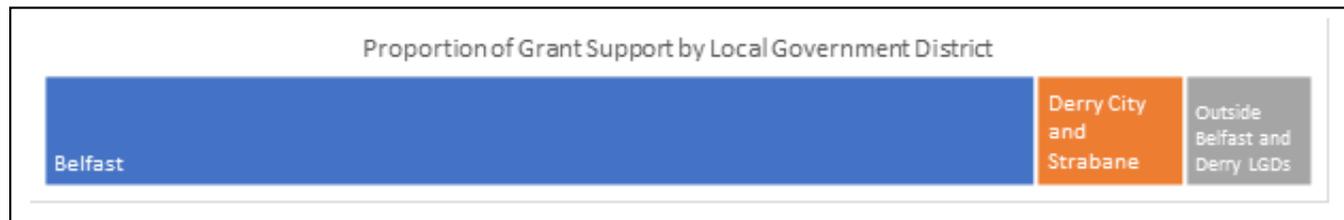
About the portfolio: 97 organisations received £12.9m in grants



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.

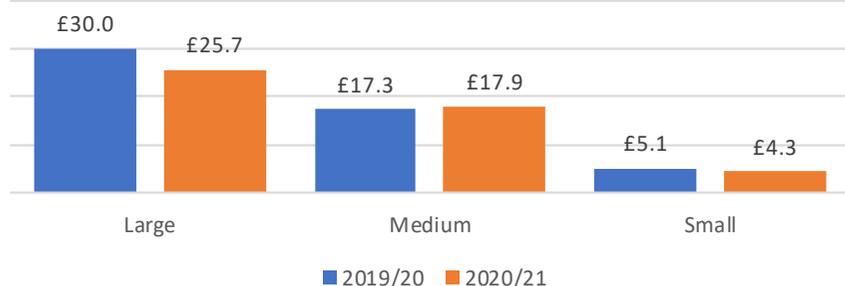
The 14 organisations categorised as ‘large’ scale (generating more than £800k in income), received 48% of the total grant fund. On average, each of these organisations received £444k each.

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.



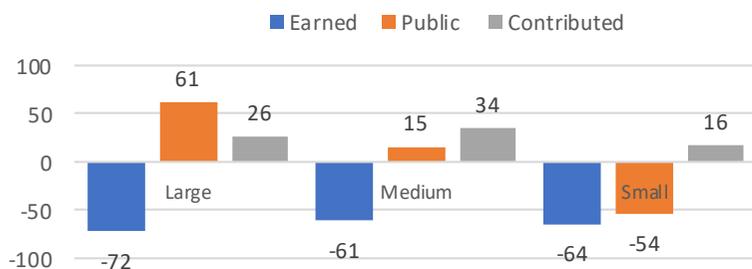
Finance: emergency COVID-19 funding provided short-term relief for some organisations

Change in income (all sources) year-on-year



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.

% change in year-on-year income by source



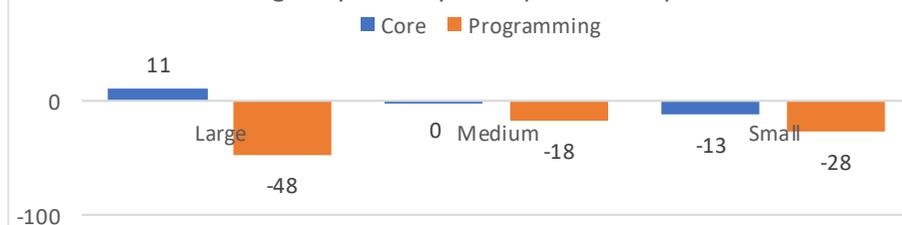
Earned income fell by £16m (69%) compared to 2019/20. This loss was offset, to an extent, by increases in income from public sources and contributed sources, both of which increased by 22%. Large falls in both earned and public income for small-scale organisations place these groups under particular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

Change in expenditure (all sources) year-on-year



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.

% change in year-on-year expenditure by source



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

Contract/freelance: 3,970

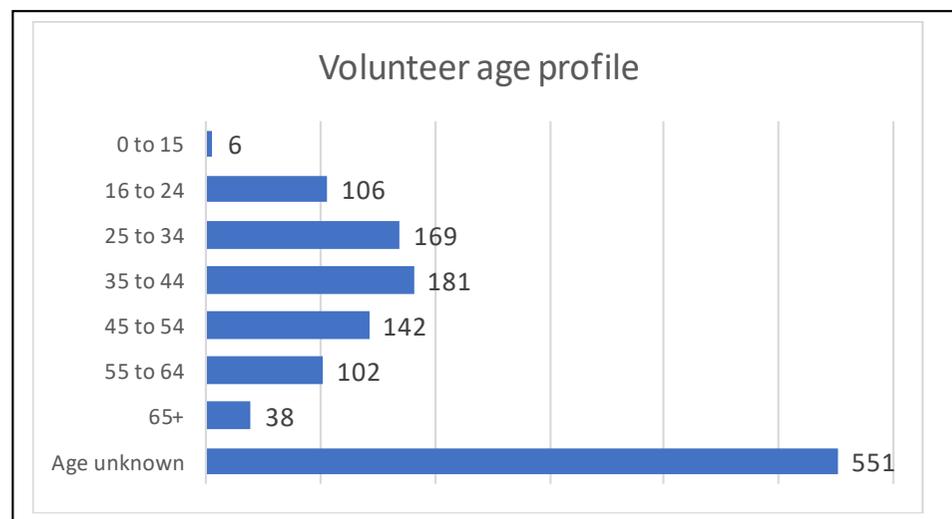
-25%

-27%

Permanent staff: 830

Compared to 2019/20

-9%



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%*

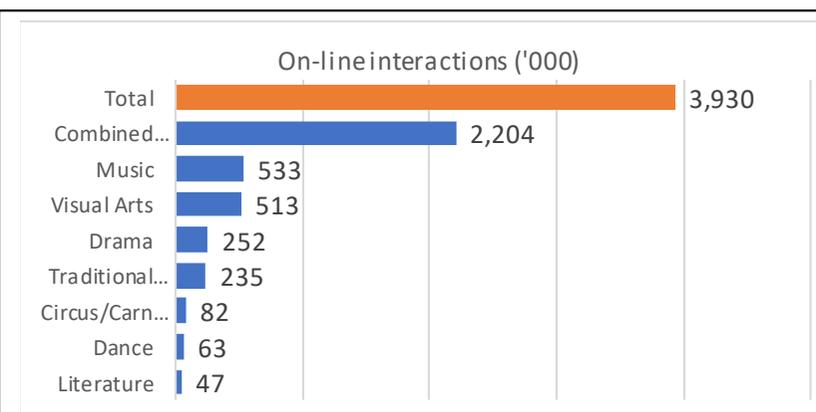
Proportion of the workforce reported as having a disability or impairment

*% excludes 'not know n' and 'prefer not to say'

59:

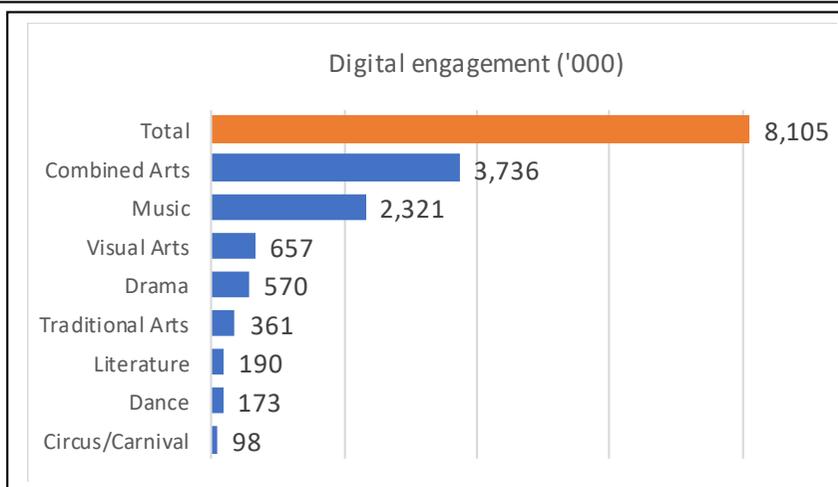
The number of physical (in person) activities recorded in 2020/21. There were 67,900 the previous year.

Activity: The combined audiences for online and digital activity in 2020/21 was an estimated 15m



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

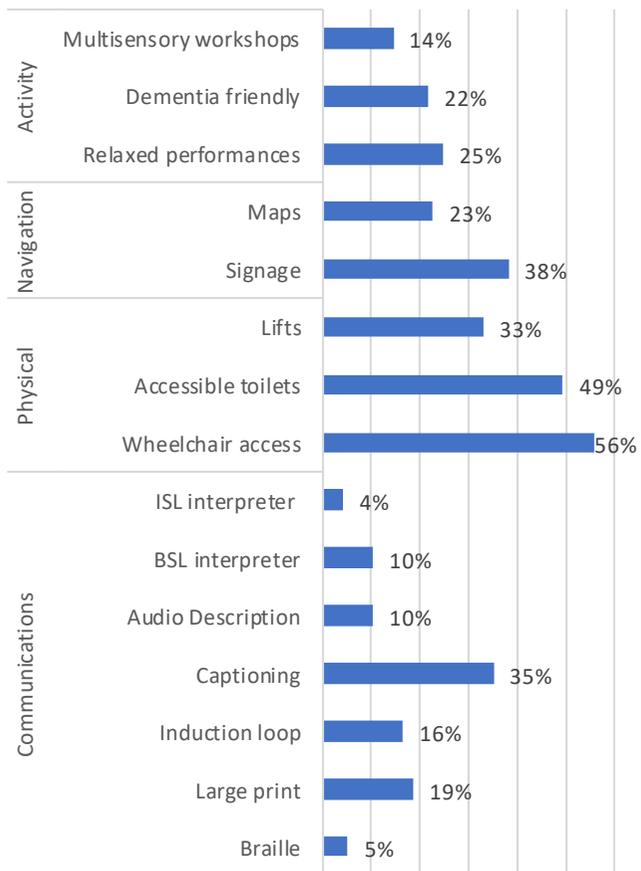
Digital activity: this relates to the use of technologies to deliver artistic or cultural experiences in new ways through online or offline environments. 99% of activity delivered was delivered via online platforms, with the remaining 1% delivered via the mediums of screenings, television or radio. These 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.



116,723:

The number of participation-based contact hours delivered in person and virtually by core funded clients

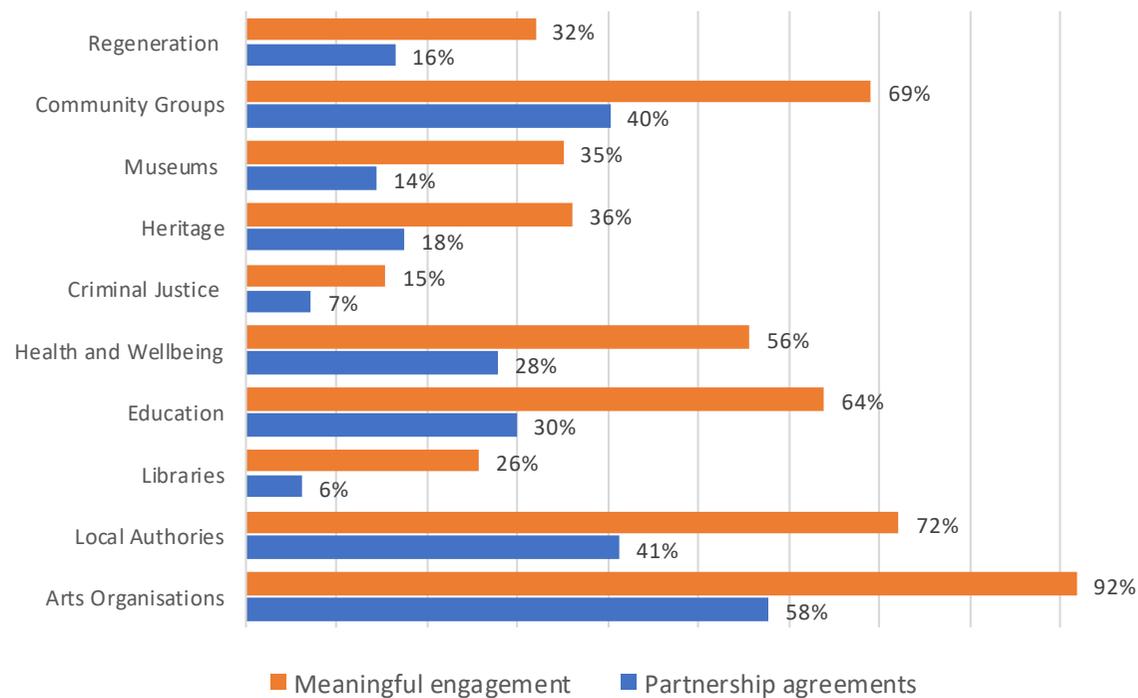
Percentage of clients using dedicated measures to improve accessibility. See tables for more information on the extent of support provided.

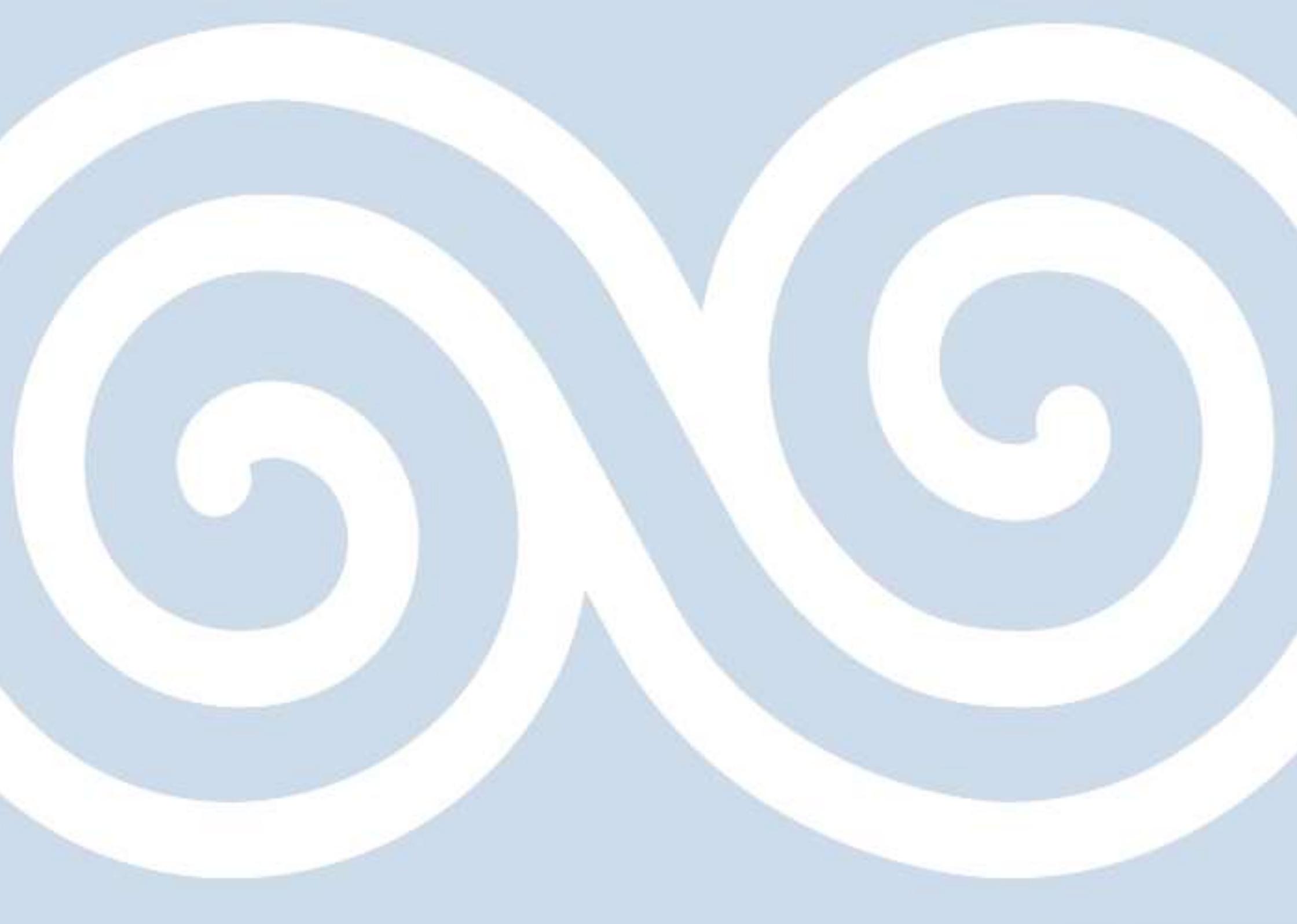


£188,479:

Income generated from ticket sales in 2020/21. A reduction of 99% compared to the previous year.

Sector engagement and partnerships





Appendix 1 – 2020/21 AFP Organisations

Aisling Ghéar Theatre Company	Cultúrlann McAdam Ó Fiaich	NI Opera
All Set Cross Cultural Project	Derry Theatre Trust	North West Play Resource Centre (The Playhouse)
An Droichead	Digital Arts Studios	Northern Ireland Piping & Drumming School
An Gaelaras Ltd	Down Community Arts Ltd	Northern Visions Ltd.
Andersonstown Traditional & Contemporary Music School	Drake Music Project Northern Ireland	Oh Yeah Music Centre
Array Studios	DU Dance	Open Arts
Arts & Business Northern Ireland	Dumbworld	Open House Festival
Arts Care	Dun Uladh Ltd	Outburst Arts Festival
Arts Ekta	Dylan Quinn Dance Theatre	Panarts
Beat Carnival	EastSide Arts	Partisan Productions
Belfast Community Circus School	Echo Echo Dance Theatre Company	Photo Works North/ Source Magazine
Belfast Exposed Photography	Féile an Phobail	Play Resource Warehouse
Belfast International Arts Festival	Flax Art Studios	Poetry Ireland
Belfast Music Society	Glasgowbury	Prime Cut Productions Ltd
Belfast Print Workshop	Golden Thread Gallery	Prison Arts Foundation
Belfast Trad (Traditional Music and Dance Society)	Greater Shantallow Community Arts	Queen Street Studios
Big Telly Theatre Company	In Your Space Circus Ltd	Replay Productions Limited
Cahoots NI Ltd	Irish Pages Ltd.	Seacourt Print Workshop Limited
Camerata Ireland	Irish Traditional Music Archive	Sole Purpose Productions
Catalyst Arts Ltd	Kabosh Theatre Ltd	Spanner in the Works
Cathedral Quarter Arts Festival	Kids in Control	Sticky Fingers Arts
Centre for Contemporary Art Derry - Londonderry	Maiden Voyage (NI) Ltd	Streetwise Community Circus
Comhaltas Ceoltóirí Éireann	Moving on Music	The Armagh Rhymers Educational & Cultural Organisation
Craft Northern Ireland	National Youth Choir of Northern Ireland	The Black Box Trust
Creative Exchange	New Belfast Community Arts Initiative T/A Community Arts Partnership	The Duncairn/174 Trust
Crescent Arts Centre		The Grand Opera House Trust

The John Hewitt Society

The Lyric Theatre (NI)

The MAC

The Nerve Centre

The Royal Scottish Pipe Band Association

The Sculptors Society of Ireland T/A Visual Artists Ireland

The Void Art Centre

Theatre and Dance NI

Thrive Audience Development

Tinderbox Theatre Company

Tyrone Guthrie Centre at Annaghmakerrig

Ulster Orchestra Society Ltd

Ulster Youth Orchestra

Ulster-Scots Community Network

University of Atypical

Verbal Arts Centre NI Limited

Walled City Music Trust

Waterside Theatre Company Ltd

Wheelworks

Young at Art Ltd