



# Emergency Grant Programme: Survey of Organisations

Findings from a dedicated survey of arts and cultural organisations in receipt of grant support under the Arts Council's Covid-19 Emergency Support Programme



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# 1.0 Key findings



## £14.7m

Distributed to arts organisations as part of the Arts Council's Covid-19 emergency programme. This represented **57%** of all funding distributed to both artists and arts organisations.

## 50%

of organisations in receipt of emergency funding responded to the survey.



**Independent venues and non-venue based organisations**

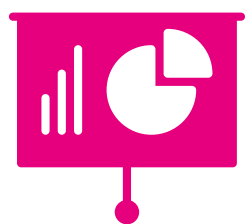
represented half of the sample. Music (**29%**) community arts (**18%**) and theatre (**13%**) were particularly well represented.



Over two-thirds of organisations used the funding to maintain engagement / keep in contact with audiences and nearly half (**48%**) enhanced their social media capacities.



Funding has protected the ability of arts organisations to deliver support to the most vulnerable groups in society such as older people, those with long-term health conditions and those suffering from poor mental health and wellbeing.



Looking to the future, organisations want to strengthen their core business models, re-engage with audiences and enhance their relationships with freelance artists.



There was overarching recognition that, in the absence of large scale physical audience engagement, the use of digital technologies to deliver artistic and/or cultural experiences represents the most viable alternative.



## 85%

Without funding, **85%** of organisations would have to reduce their scale of activity and **74%** would have to remove their creative programming entirely



**94%**

agreed that more support was still required to guarantee long-term financial stability



**80%**

agreed that their immediate financial stress had been relieved; **88%** agreed they had adapted successfully to the new operating environment



Over half of organisations responding to the survey purchased equipment to adapt to remote engagement with audiences and improve the quality of their creative work



As a result of emergency funding support, only **31%** of respondents thought their organisation would remain financially stable to the end of the 20/21 financial year



# 2.0 Introduction

This report presents a summary of findings from a survey of organisations in receipt of Emergency Programme funding from the Arts Council of Northern Ireland (ACNI) between June 2020 and March 2021.

The survey was designed by the strategic development team at ACNI to determine whether policy objectives developed to support arts and culture organisations during the Covid-19 pandemic have been met. In this instance, the policy objective was to:

- Stabilise viable organisations and venues within arts, heritage, culture and language sectors to enable them to survive, adapt and renew;
- Protect skills/jobs to adapt and build back better and
- To enable publically funded organisations to identify opportunities to increase access, participation and capacity for people and communities most disadvantaged and socially excluded in society.

Findings from this survey will help establish how effective the programme has been and support future programme design.

The extent of the impact the Covid-19 pandemic has had on the arts and culture sector in Northern Ireland was so significant it required us to make changes to our own strategic framework: Inspire, Connect, Lead (2019–2024)<sup>1</sup>. In particular, the balance of support committed to over the past 18 months had to be reviewed.

The Emergency Programme represents a key policy response by the Arts Council, in partnership with the Department for Communities, ensuring that our supports have remained aligned to the needs of the sector, the priorities of government and the ambitions of wider NI society.

Supporting tables and survey template are available via these links.

This is one of two reports examining the impact emergency funding has had on the arts / cultural sector in Northern Ireland – the other looks at the impact funding had had on **artists** and can be found on the Arts Council website.

## Supporting tables (Organisations)

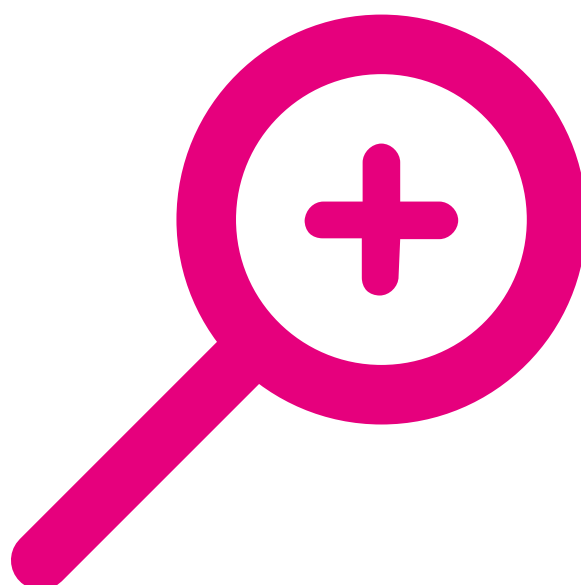
<http://www.artscouncil-ni.org/images/uploads/publications-documents/ACNI-Emergency-Grant-Tables-Organisation.xlsx>

## Survey template (Organisations)

<http://www.artscouncil-ni.org/images/uploads/publications-documents/SMR-ACNI-Organisation-Questionnaire.pdf>

## Arts Council website:

<http://www.artscouncil-ni.org/>



<sup>1</sup> ACNI Strategic Framework: Inspire, Connect, Lead (2019–2024)

# 3.0 About the organisation support programmes

A total of £26m was distributed to organisations and individual artists / creatives between June 2020 and March 2021.

This report focusses on the grant support distributed to arts organisations over this period. **This comprised 501 awards totalling £14.7m, or 57% of the total emergency funding.**

Further details of each individual programme / scheme can be found in Appendix 1 to this report.

## Health & Safety Capital Programme

Award Decision Nov 2020

53

Number of grants awarded

£776,950

Total

## Organisation Emergency Programme (1 and 2)

Award Decision Aug 2020 and Oct 2020

212

Number of grants awarded

£2,849,972

Total

## Small Capital Programme

Award Decision Nov 2020

69

Number of grants awarded

£658,877

Total

## Sustainability and Renewable Programme

Award Decision Feb 2021

167

Number of grants awarded

£10,457,126

Total

# 4.0 Methodology



The Arts Council of Northern Ireland appointed the independent research company Social Market Research (SMR) through a targeted procurement process in April 2021 to run the survey.

SMR reviewed and cleaned the recipient database, applying a unique identifier to each record. This ensured data would be anonymised, removing any risk of disclosure. SMR also supported the Arts Council to refine the survey instrument by incorporating dedicated routing and filtering.

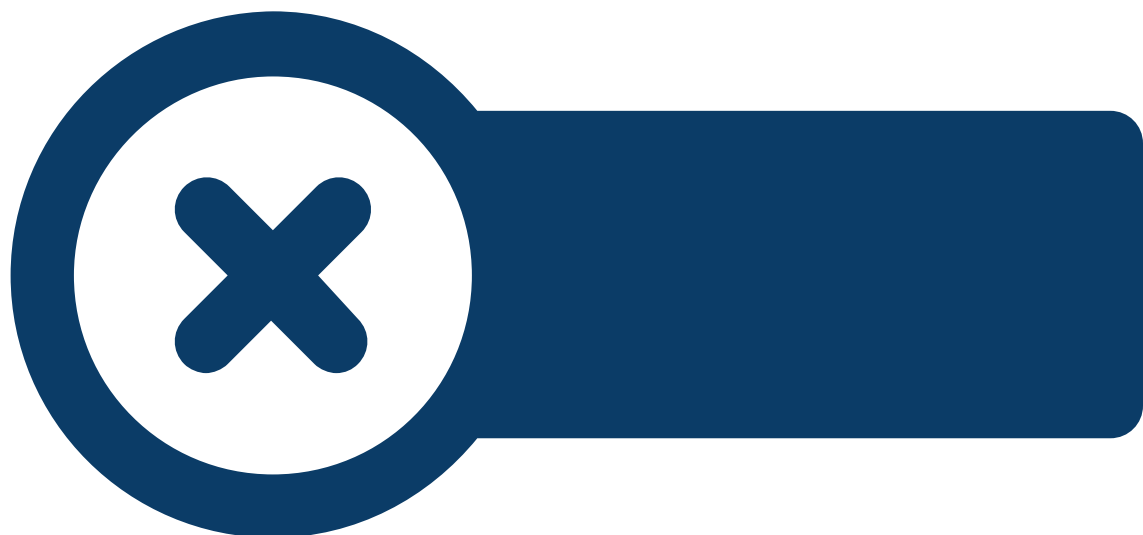
After coding, the survey was scripted before being uploaded onto the SNAP survey platform for testing and piloting. The survey link was emailed to all organisations accepting one or more award offered by the Arts Council.

The survey link was emailed to all unique organisations in receipt of one or more grant awarded (n=303). The initial invitation to participate was emailed on 11th May 2021, with subsequent reminders issued on 18th May 2021 and 25th May 2021.

The survey was closed on the 31st May 2021, **generating 153 completed returns which equates to a response rate of 50%**. This represents a particularly high response rate to an online survey, demonstrating an engaged and motivated sector.

Given the high response rate and that all key groups were represented in the achieved sample, it was decided not to weight the survey data.

An anonymised data file was forwarded to ACNI by SMR on project completion. The survey, including all data handling, was implemented in accordance with GDPR requirements, with relevant permissions for data use managed through the survey instrument. Only complete responses are used in this analysis.



# 5.0 Findings

## 5.1 About the organisations responding to the survey

### Organisations responding to the survey

**49%** of organisations responding to the survey were either independent venues (**23%**) or non-venue based organisations (**26%**). Significantly a quarter of the sample did not align to any of the pre-defined classifications, reflecting the diversity in organisations operating in Northern Ireland.



### Artforms

Survey responses represented all main artform areas, with music, community arts, theatre and visual arts most strongly represented.

30%



Music

18%



Community arts

13%



Theatre

11%



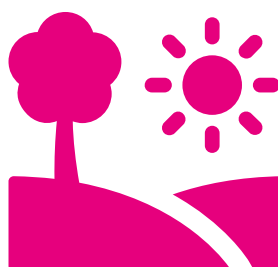
Visual arts

### Organisation home base location by urban / rural classification

The physical arts infrastructure in Northern Ireland is skewed towards urban areas – it is important to note that despite this, a significant large proportion of activities delivered by these organisations take place in rural areas and are accessible to a much larger proportion of the population than these figures suggest.

18%

Rural



82%

Urban





## Organisation home base location by Local Government District

Two-thirds of responding organisations were based in either Belfast or Derry~Londonderry.

3%

Antrim and Newtownabbey

5%

Ards and North Down

5%

Armagh City, Banbridge and Craigavon

52%

Belfast

2%

Causeway Coast and Glens

14%

Derry City and Strabane

3%

Fermanagh and Omagh

2%

Lisburn and Castlereagh

2%

Mid and East Antrim

8%

Mid Ulster

5%

Newry, Mourne and Down

## 5.2 Project activity and outputs

Skills development



48%

To enhance social media capabilities

69%

To maintain engagement / keep in contact with audiences

Funding was used by organisations to either maintain engagement with audiences and / or enhance digital capacity to reflect changes in consumption and communication patterns, brought about by the Covid-19 pandemic. This will allow organisations to adopt a more flexible approach to production and delivery moving forward.

54%

To enable remote working and collaboration

Covering deficit and loss

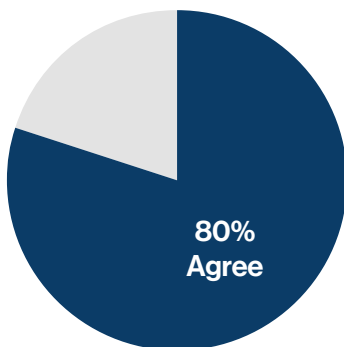
The majority of organisations (**58%**) used funding to cover deficit or loss of income as a consequence of the pandemic. The chart below demonstrates that only a small % of organisations expect to be operating in a surplus at the end of 20–21



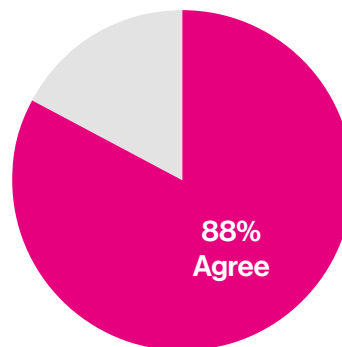
## Organisation financial stability (May 2021)

Responses to these questions indicate that organisations immediate financial stress had been relieved (**80%**) and that they had adapted successfully to the new operating environment, as it existed in May 2021 (**88%**).

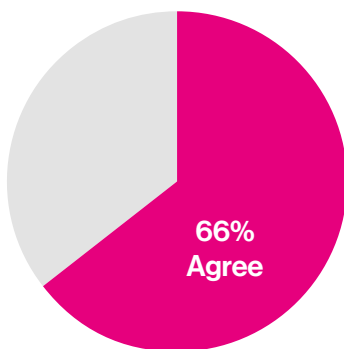
The vast majority of respondents (**94%**) agreed that longer-term support was still required to guarantee long term financial stability.



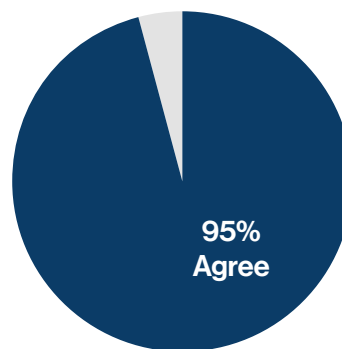
As a result of the funding my organisations immediate financial stress has been relieved



As a result of the funding received my organisation has adapted to the new operating environment caused by the COVID19 pandemic



As a result of the funding received my organisation is more financially stable



My organisation still needs support to guarantee long-term financial stability and adapt to the new operating environment

## Future financial stability

Without funding: **85%** would have to reduce their scale of activity and **74%** remove their creative programming entirely

As a result of emergency funding support, only 31% of respondents thought their organisation would remain financially stable to the end of the 20/21 financial year

## Equipment purchased

The range of financial supports available to organisations through the emergency programme enabled organisations to purchase equipment that maintained their creative and operational effectiveness.

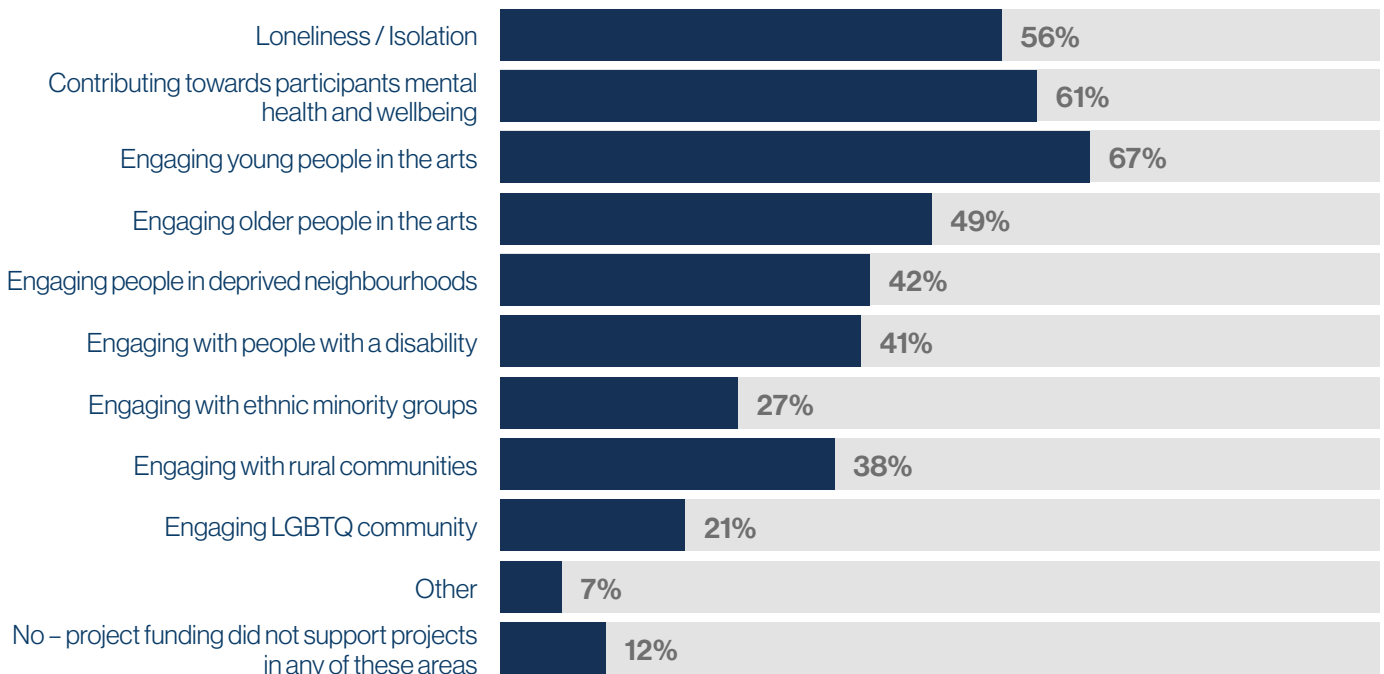
Over half of organisations responding to the survey purchased equipment to adapt to remote engagement with audiences and improve the quality of their creative work.

## Groups in society targeted through project work

Emergency funding has enabled arts organisations to deliver activities to a number of vulnerable groups as a result of the pandemic – this included young people (**67%**) and older people (**49%**).

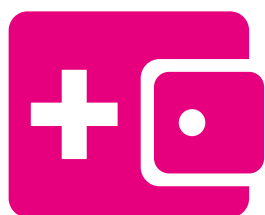
**92%** of organisations stated that this project based activity work would not have been possible with the emergency funding received.

Emergency funding has given organisations the bandwidth to respond and adapt to the new operational norms, enabling communities to reflect, creatively, on the enormous changes triggered by the Covid-19 pandemic.



## 5.3 Future organisation priorities

91%



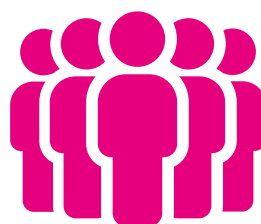
Improving financial health

86%



Building a viable business model

75%



Building audience confidence in attending live arts

73%



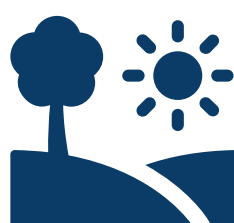
Supporting freelance artists

71%



Creating new work

65%



Improving reach into rural and marginalised communities

## Top 3 most effective audience engagement methods

60%

Digitising recorded performances

58%

Digital online events with an interactive element

48%

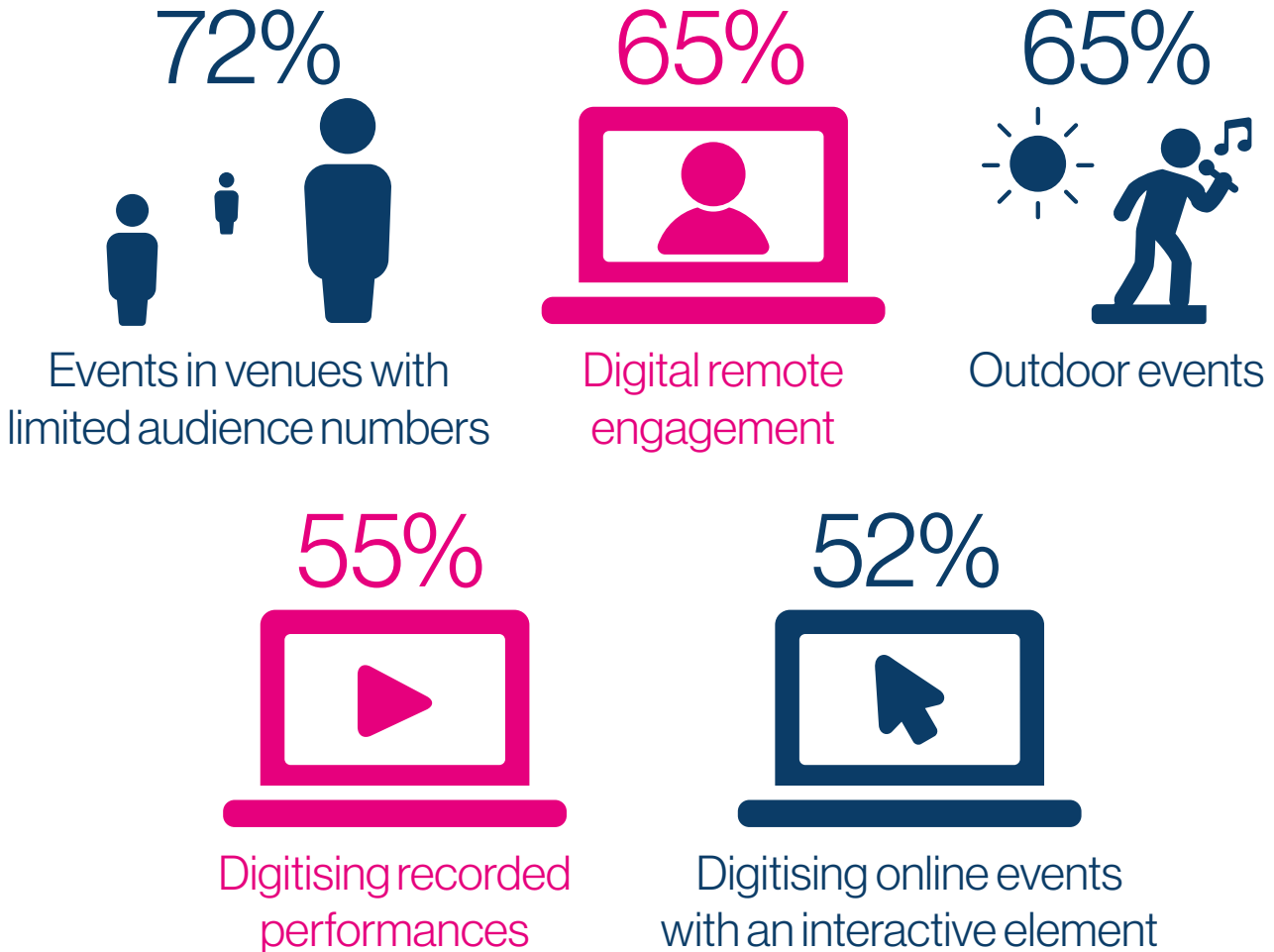
Live stream performances

In the absence of face-to-face, physical engagement, the use of digital technologies to deliver artistic and/or cultural experiences represents the most viable alternative.

## Anticipated future programming methods

Future programming methods have a stronger blended focus, combining smaller scale face-to-face engagement with online, digital output.

### Top 5 responses



Income projections for 2020/21, compared to 2019/20 (pre-Covid 19) by organisation size



Two in every five responding organisations anticipate that income levels will be **50%** or less than that earned pre Covid-19.

Organisations' trading outlook for 2021/22



Over half of respondents anticipate they will be able to continue trading but that there is uncertainty about longer term sustainability.

## Changes to organisation workforce profiles

A comparison between workforce profiles during and after the Covid-19 pandemic suggest a slight increase in confidence moving forward, but the situation remains precarious with organisations anticipating the need to reduce workforce hours and place staff on furlough.



## Ability to protect jobs, retain skills and experiences

As a result of emergency funding received, just over two-thirds of organisations (**67%**) indicated they have been able to protect jobs, retain skills and experiences though the pandemic.

## Number of jobs retained as a consequence of ACNI funding

**94**

Organisations

**399**

Jobs protected

Based on responses from 94 organisations, emergency funding has protected 399 jobs. That equates to 4.2 jobs per organisation. One organisation indicated that emergency funding had led to the retention of 54 jobs.



Organisations surveyed were asked whether they had any general thoughts on the future of the creative sector in Northern Ireland. Here are some of their responses:

**An increased investment in the Arts is essential.**

Covid-19 has highlighted the benefits of the arts sector to the people of NI, but also the **vulnerability of the sector** due to lack of funding and investment.

Financial investment would be relatively low for higher gains. Reduce people's reliance on medication, reduce stress and anxiety and therefore save time, money and resources of health service.

It is going to be a struggle with numbers permitted indoors safely...**access to further project funding would be useful until things level out again.**

We are going to need the creative sector of our community to help with expressing the major emotional trauma experienced through the Covid 19 pandemic.

Some of the most therapeutic value can be experienced through arts and crafts and drama. **We need the Arts sector of Northern Ireland to be funded and flourish.**

**We need to attract young people** back to participation in the arts as they will have lost valuable time during lockdown and possibly social interaction will take a long time to recover, **resulting in loss of skills.**

Unfortunately the situation is not something that will be solved in the next financial year alone and the repercussions are going to be longstanding.

**It is going to be a slow emergence** and, depending on future Covid restrictions towards the end of the year, in the winter months, will potentially make or break people. But if as stated by governmental sources that "We are in this together" then **we need to develop strategies** to make this a reality.

**Protecting the creative sector** will be vital in supporting the recovery of society from the pandemic. It is going to be a challenging year ahead for the sector.

There has to be a **greater investment in the arts** and that we can't just go back to where we were before the pandemic. It is evident now, more than ever, how much the public **depends on artistic content in our daily lives.** We must capitalise on this and realise the real value of the arts and the impact it can have on society as a whole!



# 6.0 Appendix

## 6.1 Individual programmes / scheme

### Organisation Emergency Programme (Rounds 1 and 2)

Number of grants taken-up	212
£ sum of awards made	£2,849,972
Award decisions made	August 2020 and October 2020
Funding sources	Creative Support Fund (Department for Communities)
Programme aims	<ol style="list-style-type: none"><li>1. 'Buy creative time', enabling organisations to produce new ideas for programming;</li><li>2. Allow organisations to plan for recovery; and,</li><li>3. To support organisations to withstand the shock to their organisation of substantial loss of income during the first lockdown.</li></ol>

### Health and Safety Capital Programme

Number of grants taken-up	53
£ sum of awards made	£776,950
Award decisions made	November 2020
Funding sources	Department for Communities
Programme aims	To enable organisations to purchase equipment and/or carry out minor works to their premises which would allow them to operate during the Covid-19 restricted period.



## Small Capital Programme

Number of grants taken-up	69
£ sum of awards made	£658,877
Award decisions made	November 2020
Funding sources	Department for Communities
Programme aims	To enable arts organisations purchase equipment and/or carry out minor works to their premises which enhanced artistic services. It sought to support activities which benefited the people of Northern Ireland or that helped arts organisations to carry out their work. This included equipment and minor works which enabled remote working, improved direct delivery of arts provision and raised the quality of artistic product.

## Stability and Renewal Programme for Organisations

Number of grants taken-up	167
£ sum of awards made	10,457,126
Award decisions made	February 2021
Funding sources	Department for Communities with monies drawn from the NI Executive Barnett Consequential allocation
Programme aims	The programme was designed to provide stability to organisations by preventing closure and allowing for the continued delivery of service outcomes.

## 6.3 About the Arts Council's Strategic Development Function

The Art Council's strategic development function is aligned to supporting and delivering its five year plan and annual business plan.

We use a programme of research to understand how art and culture impacts people's lives. Through research and evaluation, we produce evidence and intelligence that supports art and culture organisations to improve their practice and to demonstrate the impact they are having.

Designated as a producer of Official Statistics, we produce a number a range of annual and stand-alone reports to inform art and culture policy and demonstrate alignment to government's key targets as set out in the Programme for Government.



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July 2021