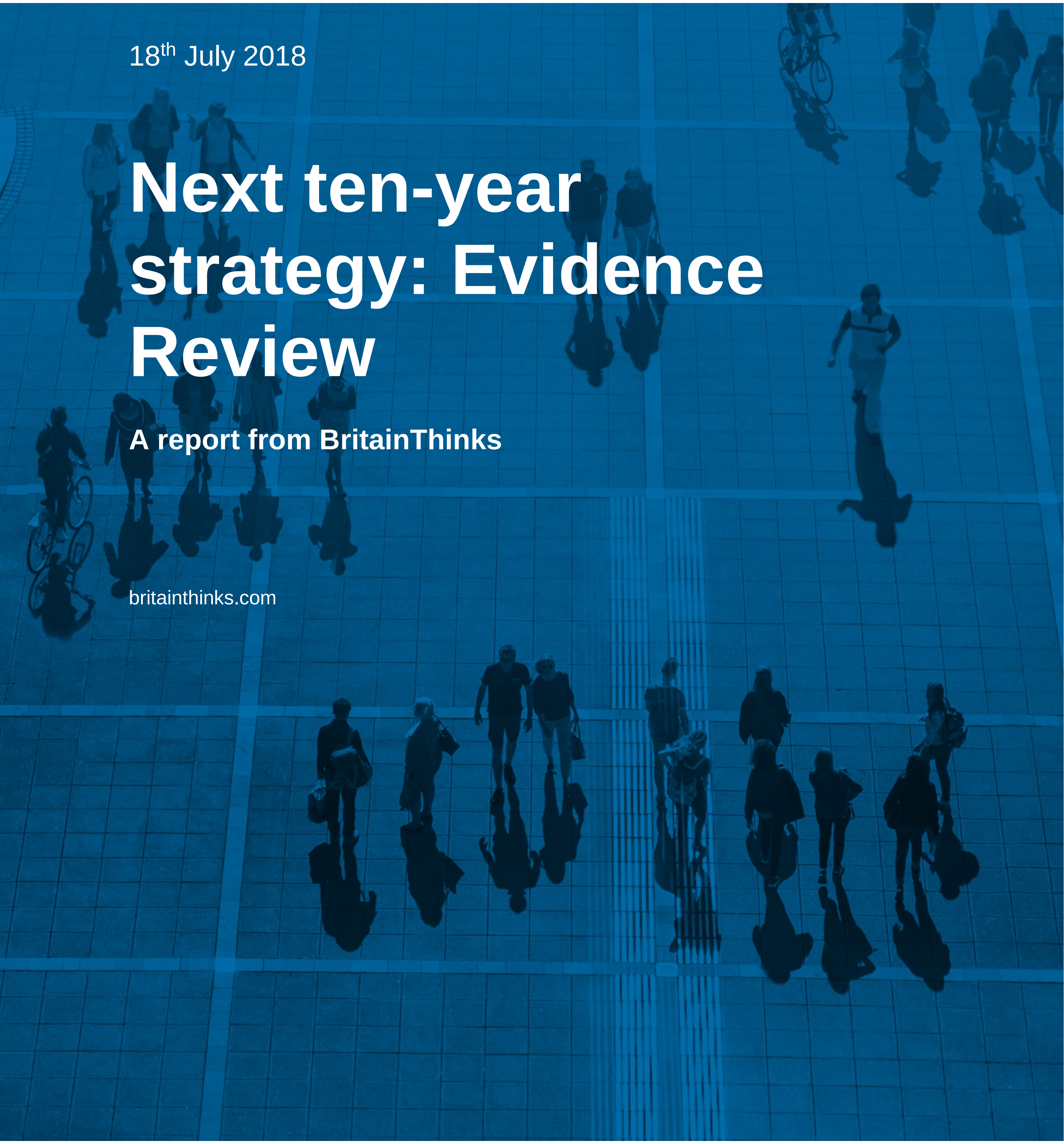


18th July 2018

Next ten-year strategy: Evidence Review

A report from BritainThinks

britainthinks.com

Foreword

Since its creation 70 years ago, the Arts Council has served as the principal agency championing, developing and investing in art and culture across England.

We invest more than £445 million of public funding every year, supporting a wide range of activities across the arts, museums and libraries. We feel it's important that this investment is distributed according to a shared sense of direction, purpose and vision with artists, arts and cultural organisations, our partners across central and local government, education, business and the charitable sector; and most importantly, with the public, who provide the money that we distribute.

Underpinning the investment, we also offer support and guidance to all those we work with and fund – skills training, financial acumen, career pathways, research and educational support. We bring together a wide range of individuals and organisations across the sector to support the creation of a cultural ecology that spans the vast geography and diversity of people and communities across England. We work to create a sense of connection locally and nationally; through dialogue and networks that share knowledge and resources along with a love for art and culture and the extraordinary benefits they have in all our lives.

This confident sense of direction and connection derives from our ten-year strategy and mission; Great Art and Culture for everyone, with its five ambitious goals. Our current strategy is the first we have produced; it evolved though consultation with all our partners, and it has formed the basis of our relationship with the sector ever since. It embraces the ambitions and values we share, orientates our investment and has been crucial to the advances we've made together. We have achieved so much with the current strategy and celebrated everything that works well, but we have also learnt the world changes in ten years; new challenges present themselves along the way and it's important to consider how we can improve, grow, develop and remain current.

That strategy runs until 2020. Looking ahead to 2030, any strategy must be relevant to its context; when the world around us changes, we need to look at what has worked well for us in the past and ask what the future will require. There will be many perspectives on this, and in thinking about our strategy for the next ten years we have, as before, embarked on a conversation and listening exercise, which is the substance of the Conversation report and findings. To complement the Conversation, we also commissioned this Evidence Review and wider body of research reviewing over 100 reports to see how arts, museums and libraries have progressed since 2010.

This work and these insights will help us shape a framework for our strategy that we will use to develop a consultation in Autumn 2018 across the sector, stakeholders, public and the staff. We want to create a strategy and vision for art and culture that draws upon the passions, hopes, opportunities, ambitions, concerns, knowledge and experience of our partners and the public. It is important that we use all the means on offer to help us listen to as many people and voices as possible, reflective of the rich diversity and intricate geographies across England.

I am grateful to BritainThinks for their partnership with us on this project and report, and to everyone who has fed in their views and contributed to this stage of the process. This work will help us in our consultation with staff, stakeholders, the sector and the public in October, and it will be central to the development of our new strategy, which we will be publishing next year.

I would particularly like to thank Simon Mellor, Deputy Chief Executive Arts and Culture, and Michelle Dickson, Director Strategy, for their leadership on this important piece of work. They have spoken to a wide range of individuals in an engaging way that has inspired confidence in our approach to understanding the key issues and challenges affecting the sector now and in the future.

Darren Henley

Contents

1. Introduction

1.1 Overview

BritainThinks was commissioned in February 2018 to undertake a review of how the arts, museums and libraries sector has progressed since 2010. Specifically, this review centred on the following key areas:

- Perceptions of, and understanding of quality in the arts and culture sector;
- Engagement in arts and culture; and
- Resilience and sustainability of the arts and culture sector.

This report summarises the evidence collated and reviewed, highlighting key themes and trends within the evidence to help Arts Council England's future strategy development.

Throughout the report, 'sector' is used to refer both to the organisations working within arts and culture and their employees, as appropriate to the context.

1.2. Methodology

1.2.1. Key questions

Our approach to this evidence review follows good practice guidelines on undertaking a Rapid Evidence Assessment (REA). The key research questions that this review seeks to answer were agreed with the Arts Council prior to the review commencing. These are as follows:

Perceptions of, and understanding of quality in the arts, museums and libraries

1. **Perceptions of, and understanding of quality**
   a. What has been the perception of the quality of work produced since 2010 by artists, organisations, peers and audiences?
   b. What does a high-quality experience look like to different groups in society in different places across England and across different artforms, practices and situations?
2. **Producing high quality work**
   a. What have been the enablers and barriers to the production and delivery of high quality excellent work since 2010?
   b. What are arts and cultural organisations doing to ensure their cultural offer meets the demands of its audiences and helps audiences and participants contextualise and extract meaning from the work they produce?
   c. To what extent are arts and cultural organisations setting clear goals and anticipated outcomes for their work, inviting and using critical feedback and involving audiences in their creative decision-making?
3. **Talent development**
   a. Are there clear and effective talent development routes for artists in England?
   b. What are the enablers and barriers to talent development in England?
4. **International perceptions**

a. How is the quality of English arts and culture perceived by the rest of the world?
b. To what extent is the quality of the arts and cultural offer in England a reason for international tourists to visit England?

5. International export and partnerships

a. To what degree are arts and cultural organisations in England exporting their work internationally? Is the quality of the work an important factor in this?
b. Has there been an increase in international partnerships and creative collaborations since 2010?
c. What are the enablers and barriers to English artists exporting their work internationally and/or engaging in international collaboration?

Participation in arts, museums and libraries

1. Participation of adults

a. Who is engaging and participating in arts and culture? (by protected characteristic and socioeconomic group)
b. What are the artform trends in audience participation and engagement?
c. What factors influence people who do/do not engage in arts and culture? In particular, what is the role of:
   - Personal tastes, preferences and motivations
   - Perceptions of 'arts and culture' forms
   - Wider family habits and behaviours
   - Cost and affordability of arts and culture
   - Availability and accessibility of arts and culture
   - Quality of arts and culture
d. In the next 10 years, how we might expect these factors to change, and what new factors/context might influence engagement of people in arts and culture?
e. Who is not engaging and participating in arts and culture? (by protected characteristic and socioeconomic group)

2. Participation of children and young people

a. To what extent do children and young people in England currently:
   - Engage in arts and culture?
   - Consider or take steps towards a career in the creative industries?
b. What factors influence children and young people who do not engage in arts and culture not to do so? In particular, what is the role of:
   - Personal tastes, preferences and motivations
   - Perceptions of 'arts and culture' forms
   - Wider family habits and behaviours
   - Cost and affordability of arts and culture
   - Availability and accessibility of arts and culture
   - Quality of arts and culture

c. In the next 10 years, how we might expect these factors to change, and what new factors/context might influence engagement of children and young people in arts and culture?

Resilience and sustainability of arts, museums and libraries

a. What have been the trends in income diversification in a) the NPO and b) the wider sector since 2010?
b. What kind of new business and financial models have organisations adopted, if any, to withstand the financial pressures of cuts to public funding? What other business models are available?
c. What have been the trends in local authority funding for arts and culture since 2010 and where is it heading? How does this differ by area?
d. What have been the trends in environmental sustainability and reducing carbon footprint for arts and cultural organisations in the NPO, and more widely?
e. What are the key barriers and enablers of change in organisational resilience and environmental sustainability for the arts and culture sectors?

1.2.2. Inclusion criteria

- Studies in England
- Studies published since 2010
- Formal, robust research (i.e. subject to a clear research process based on scientific principles containing primary data gathered using sound methodologies or robust analyses of secondary data)
- Measures the outcomes that are relevant to ACE's goals
- Reports that are available during the REA timeframe (those submitted via the 'Call for Evidence' by ACE, and those available between 12th March – 13th April 2018)
- Available on sites including the following, and in the public domain (i.e. not behind a paywall – except where referenced in freely available sources)
    - Google Scholar
    - DCMS
    - Government White Papers
    - Universities in England (online publications)
    - Creative Industries Federation
    - Major primary research agencies
    - Sector organisations
    - Arts and Cultural organisations
    - ACE Bridge organisations
    - National Portfolio Organisations
    - Think Tanks

1.2.3. Exclusion criteria

- Studies that are not relevant to the English sector
- Studies that do not focus on the key themes outlined by Arts Council England
- Studies that do not use a clear research process to produce credible findings

- Soft evidence (i.e. primary commentary, anecdotal evidence or interview data)
- Studies published before 2010
- Studies not published in English language
- Studies that are opinion-based

2. Perceptions of quality in the arts and culture sector

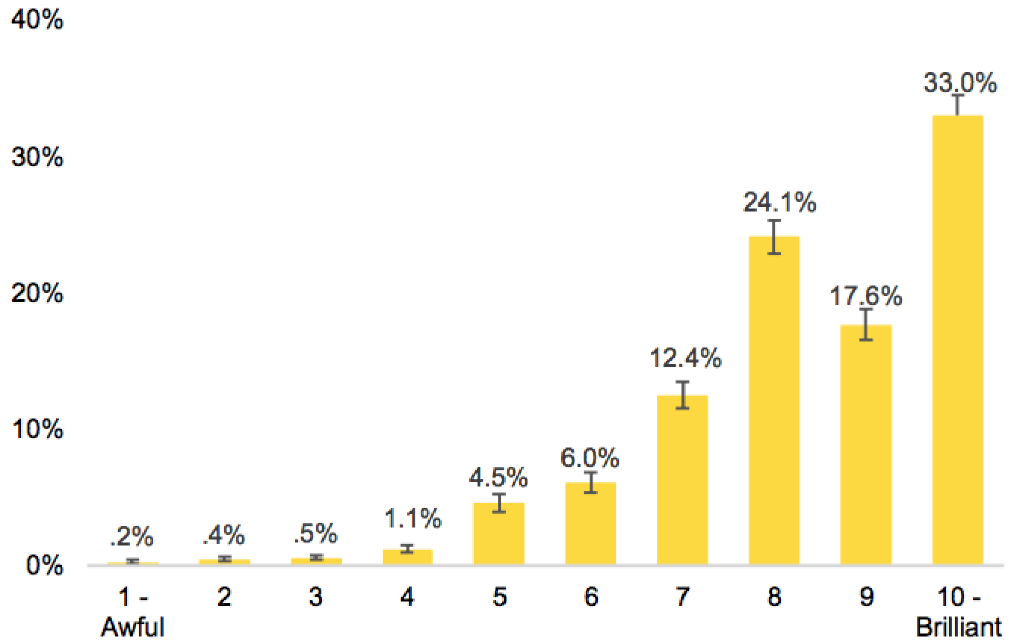
2.1. Perceptions of, and understanding of quality

- The most recent data regarding audience perceptions of quality in arts and culture comes from the 2016/17 Taking Part survey (Department for Digital, Culture, Media and Sport, 2018a), which reported high perceptions of quality in artistic activities among both participants and attendees.

2.1.1. Arts

- Of those surveyed, 33.0% of respondents felt that the arts activity they had participated in was brilliant, giving it 10 out of 10, a significant increase from 29.2% when this question was first asked in 2006/07. On average participants gave an enjoyment rating of 8.3 out of 10.

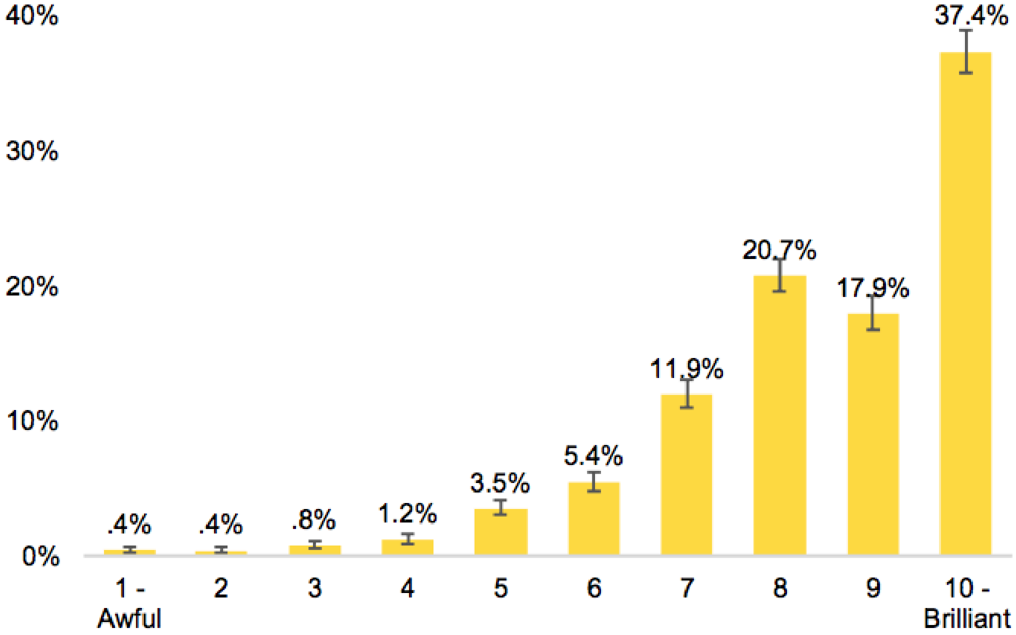
Figure 1: Enjoyment amongst arts participants, 2016/17



Source: Taking Part Survey 2016/17 (Department for Digital, Culture, Media and Sport, 2018a)

- Enjoyment of artistic events that were attended by adults surveyed was also high. 37.4% felt that the event they attended was brilliant, giving it a top score of 10 out of 10 – a significant increase from 27.0% when this question was first asked in 2006/07. On average respondents gave an enjoyment rating of 8.4 out of 10.

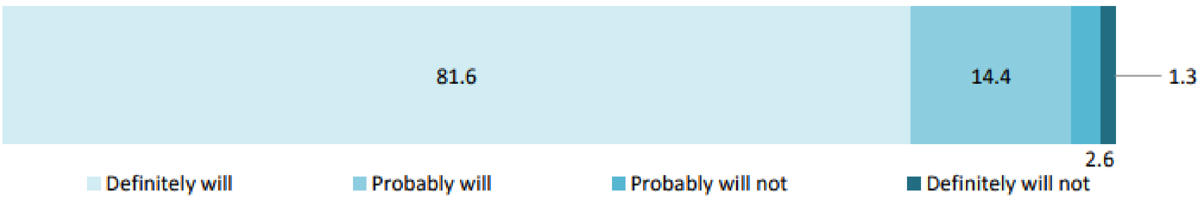
Figure 2: Enjoyment amongst arts attendees, 2016/17



Source: Taking Part Survey 2016/17 (Department for Digital, Culture, Media and Sport, 2018a)

- The 2016/17 report did not include data on likelihood of repeated participation; however, in the 2015/16 survey (Department for Digital, Culture, Media and Sport, 2017a), almost all adults who participated in an arts activity said that they would definitely or probably do that activity again (96.0%).

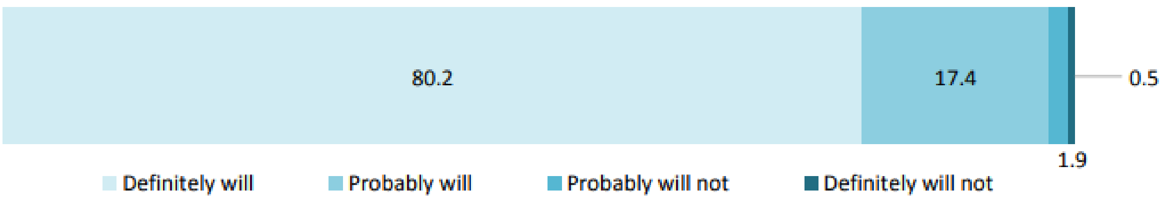
Figure 3: Likelihood of taking part in activity again amongst arts participants 2015/16



Source: Taking Part Survey 2015/16

- Of those who had attended an arts event in 2015/16, almost all (97.6%) said that they would definitely or probably attend an arts event again.

Figure 4: Likelihood of attending an event again amongst arts attendees 2015/16

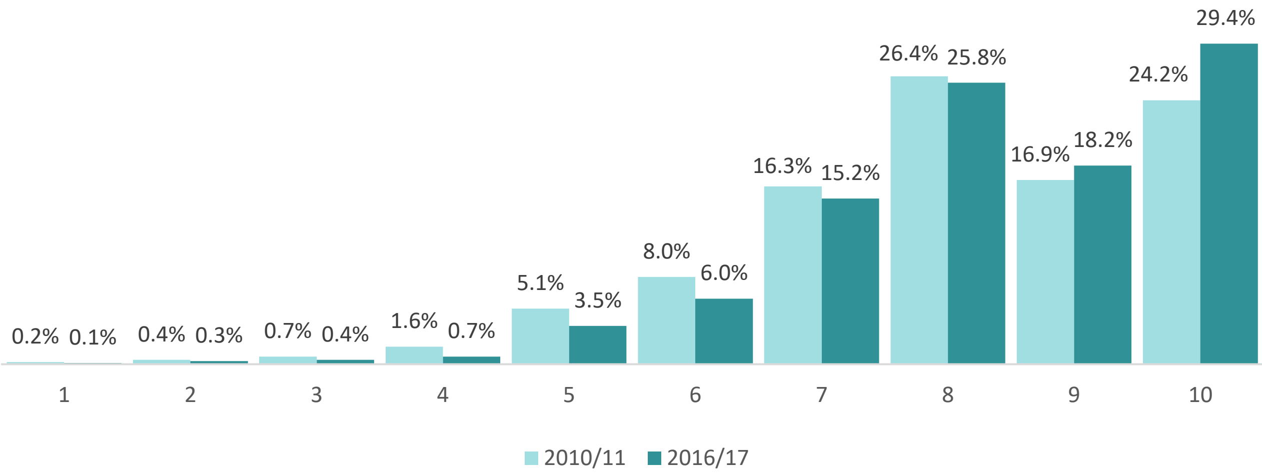


Source: Taking Part Survey 2015/16

2.1.2. Museums and galleries

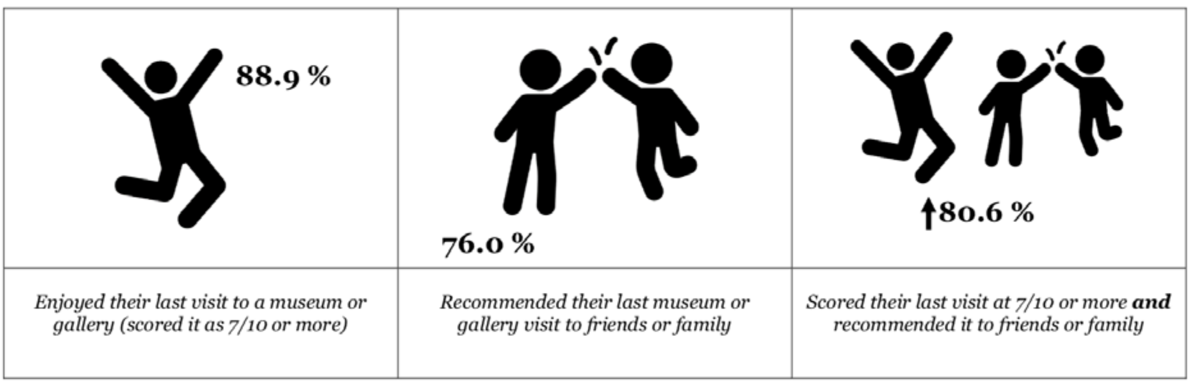
- Enjoyment of museums and galleries was lower than arts, with 29.4% of adults giving their last visit a top rating of ten out of ten.
- This represents a significant increase of 5.2 pp since 2010/11, however, while the percentage of adults rating their experience as eight out of ten or higher rose by 4.9 pp to 88.9%.
- In 2016/17, 76.0% of adults recommended the museum or gallery they visited to friends or family, and those who made recommendations were far more likely to have rated their visit as seven out of ten or higher.

Figure 5: Enjoyment of last museum or gallery visit, 2016/17



Source: Taking Part Survey 2016/17 (Department for Digital, Culture, Media and Sport, 2018b, forthcoming)

Figure 6: Relationship between enjoyment of a museum or gallery and likelihood of recommending it to friends or family, 2016/17

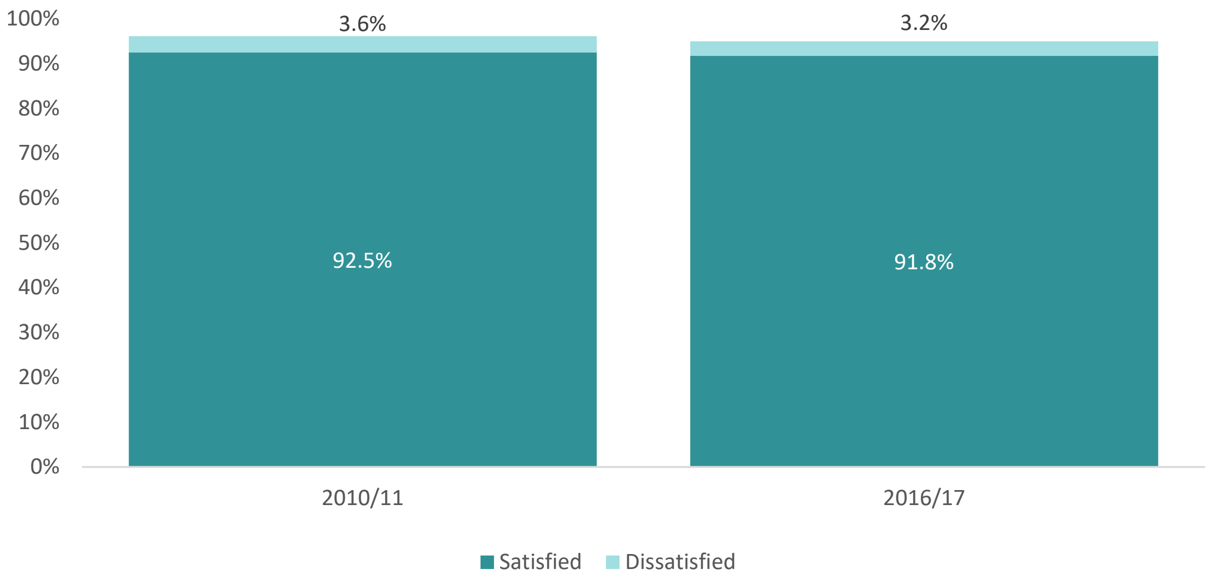


Source: Taking Part Survey 2016/17 (Department for Digital, Culture, Media and Sport, 2018b, forthcoming)

2.1.3. Libraries

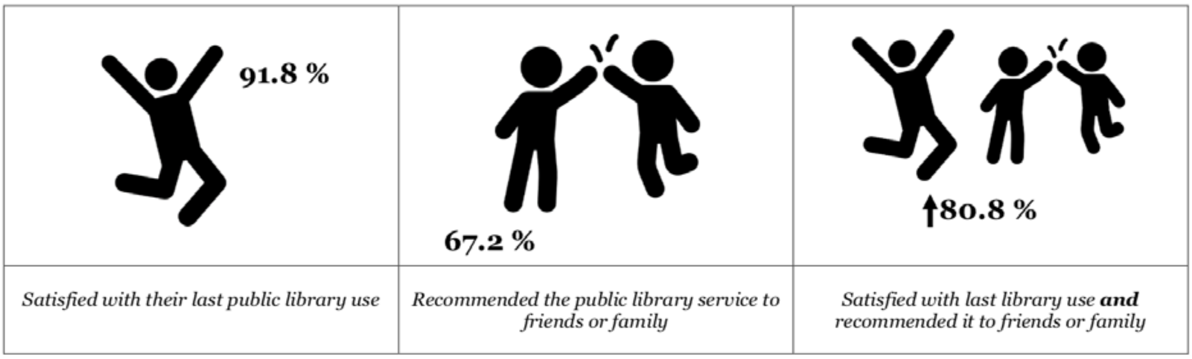
- 91.8% of adults were satisfied with their experience of a library – a statistically similar proportion to 2010/11.
- There was a significant increase in the proportion of adults who said they would recommend the library they visited to family or friends, however, rising 4.4 pp from 62.8% in 2010/11 to 67.2% in 2016/17.
- Likelihood of recommendation was, as with museums and galleries, linked to the quality of the experience. Around seven out of ten (69.7%) of adults who were satisfied with their experience recommended the library to family or friends.

Figure 7: Satisfaction with last library use, 2016/17



Source: Taking Part Survey 2016/17 (Department for Digital, Culture, Media and Sport, 2018b, forthcoming)

Figure 8: Relationship between satisfaction with a library and likelihood of recommending it to friends or family, 2016/17



Source: Taking Part Survey 2016/17 (Department for Digital, Culture, Media and Sport, 2018b, forthcoming)

- Involve and Dialogue By Design's report (2013) into what the public value about public libraries demonstrates the contextual nature of the value/excellence debate. It lists four key areas of value for the public in public libraries which are:
    - The importance of look, feel and purpose in the library space;
    - The value of libraries to children and young people;
    - The role of libraries in collecting and offering a gateway to culture; and
    - The inclusivity of libraries and their role in social opportunity and equality.
- A report by Ipsos Mori and Shared Intelligence (2016) argues that public libraries will need to change and innovate in response to changing contexts and public expectations, and therefore 'excellence' in this sector may change as fast as individual public library services achieve it.

2.1.4. Other indicators for understanding quality

- The net promotor score is an average index which indicates how likely someone is to recommend visiting an arts or cultural organisation to friends. Score ranges from -100 (detractors) to 100 (promotors). Net promoter scores from people attending National Portfolio Organisations (NPOs) range from 66 in the North East to 71 in the North West.
- Whilst both of these sets of statistics provide an indication as to whether or not audiences have had a positive and enjoyable experience, they do not provide an indication as to why. A significant initiative that aims to address this question is the Impact and Insight Toolkit (see below, 2.4.1).
- There is also no evidence explicitly linking quality with participation or perceptions of lack of quality in arts and culture with lack of participation; instead, barriers are more likely to be related to attitude, access or wider behaviours (see below, 3.5).
- Some sources, however, have noted that the very notion of 'quality' risks being a negative factor in and of itself. 64 Million Artists (2016) highlighted that language, attitudes and what they described as the prevailing 'excellence' narrative in the arts can be divisive in terms of engaging a broader audience to the arts. This has led to calls from some to shift investment from 'the gatekeepers of high arts' to the grassroots. For example, they cite Riley and Laing's (2010) correlation between higher socio-economic groups and what they refer to as 'legitimate culture' with their research on the age range and social class of jazz audiences showing that a higher proportion of socio-economic groups A and B (13%) had attended jazz concerts than that of the C1 group (9%), C2 (7%) or D and E (only 3%).
- O'Brien and Oakley (O'Brien & Oakley, 2015) also review literature in relation to inequality in arts consumption and production and find numerous examples of certain types of cultural production being marginalised and stigmatised through the lens of discussions about quality. They cite James (2012), whose PhD thesis identifies how expressions of youth and black British music have been marginalised by relating them to violence or anti-social behaviour whilst at the same time castigating them for being overly commercialised, inauthentic and thus having 'sold out'.

- There is also a difficulty for visual artists with regards to the influence of commercialism on ideas of quality. Ravetz and Wright (2015) explore systems of validation for visual artists working outside of the gallery system, arguing that many artists do not accept the traditional routes to validation of the quality of their work – specifically gallery commissions. The report argues that:

  “the difference in values and ways of working between this field and gallery culture, demands a new and different structure of validation, one based on in-depth consultation with artists, participants, producers and commissioners.” (Ravetz & Wright, 2015)

2.2. Understanding of quality since 2010

- Whilst widely recognised that understanding and measuring quality and excellence is challenging, the arts and cultural sector, funding bodies and the academic community have developed an ever-increasing number of frameworks, initiatives and metrics, using a mixture of quantitative and qualitative methodologies to further understanding in this area.
- In their 2014 literature review WolfBrown (Carnwath & Brown, 2014) explore the academic literature in relation to this area, noting the wealth of researchers that have attempted to deconstruct excellence and quality into elements that can be assessed or quantified, and a shift in focus from an organisation’s reputation, technical skill and artistry to a more holistic understanding of the organisational conditions in which high quality programmes are likely to be conceived and realised.
- Attempting to cut through the ambiguous language around ‘excellence’ and ‘quality’, the review uses the term ‘creative capacities’ to describe arts and cultural organisations’ ability to devise and deliver impactful activity. The review determines that there are a number of core elements that constitute an organisation’s ‘creative capacity’. These are:
  - Clarity of intent, risk-taking;
  - Community relevance;
  - Excellence in curating and capacity to innovate;
  - Technical proficiency, skill and artistry;
  - Capacity to engage audiences; and
  - Critical feedback and commitment to continuous improvement.
- Others are less convinced of the ability to articulate the impact of arts and cultural experiences in words and quantifiable statements. Two studies from the AHRCs cultural value project stand out here. Ben Walmsley (2016) argues that the value of the arts cannot be captured through language alone and calls for a move away from trying to prove and evidence value in favour of exploring in depth the experience of the audience and the reasons behind audience’s own desire to understand arts value. Walmsley conducts a study called ‘deep hanging out’, spending deep and highly engaged time with audience members to understand the impact a piece of art has on them. The study *“revealed the limitations of language in capturing the value of the arts, yet confirmed perceptions of the arts as a vehicle for developing self-identity and expression and for living a better life”.* Walmsley suggests this implies a

changing relationship between artists and their audiences, *"based on a more relational form of engagement and on a more anthropological approach to capturing and co-creating cultural value".* Matthew Reason (2010), explores similar challenges in relation to theatre and experiences of performance. He uses drawing and open, free-association questioning techniques to explore participants' responses to the performances but concludes that the questioning process itself is a process of joint meaning-making between the researcher and the participant, which is different to the experience itself.

- This is echoed in Behr, Brennan and Cloonan's (2016) study of audiences attending a range of live music events at Edinburgh's Queen's Hall venue. This study found that while individual expressions of value were hard to define in pragmatic language, there was value in understanding more about audience members' perceptions and beliefs about what made something a high-quality experience for them. Similarly to Walmsley (2016), the study suggests a shift from attempting to understand and measure quality as an end itself towards an analysis of how people ascribe value – de-emphasising the noun 'value' and focusing on the act of valuing. An interesting finding from the study was that although it was difficult to find a common language or even commonality in the different aspects of live music that people ascribed value to, all respondents *"referenced an experience that, at its best, is in some way transcendent"*. The respondents didn't necessarily need to achieve this transcendence for the concert to be of value to them, but the potential for transcendence was a key factor in continuing to attend live music events.
- King's College London's *Towards Cultural Democracy* (2017) poses some new questions and issues for measuring quality and excellence in arts and culture. It argues against a 'supply side' approach to arts and cultural activity and in favour of recognising the enormous range of cultural creativity across the UK, including the 'everyday creativity' and 'everyday participation'. What excellence and quality look like in this context is not clear, however the work that has already been done to look at excellence and quality in participatory settings can provide some guidance. In a report summarising the impact of cultural investment in Liverpool (Burghes & Thornton, 2017), a number of quality principles for participatory art projects were articulated. These were developed through research including 36 organisations delivering participatory arts in 2015/16 in Liverpool. The principles are:
    - Removing barriers;
    - Flexibility;
    - Regularity;
    - Participant-led;
    - Ethical approaches;
    - Partnership working;
    - Positive atmosphere; and
    - Professional practice.
- Some of the challenges of resolving different views and approaches to excellence in participatory projects will be explored in greater detail in the context of Creative People and Places (CPP) in the next section.

2.3. Arts Council England Activity

- It is not possible to accurately gauge the overall prevalence of self-evaluation among arts and cultural organisations, or the extent to which the sector is involving audiences in creative decision making, from the available literature. However, the nature of the debate and extent of documentation of approaches suggests that this is a mature conversation in a sector that has been trying different approaches to engaging audiences in evaluation and creative planning for at least 15 years.
- Several reviews (e.g. (Crossick & Kaszynska, 2016); (Consilium, 2016a), (O'Brien & Oakley, 2015) etc.) have also documented work that has been undertaken across arts and culture to explore ways of measuring quality. Much documented activity has been driven and/or funded by Arts Council England through its Quality Principles, Quality Metrics and Creative People and Places programmes (explored in more detail below).
- In addition, other charitable and public funders have required audience-focussed evaluation which has built the sector's toolkit of available evaluation approaches and fostered a culture of evaluation. Examples include the Paul Hamlyn Foundation's "Artworks" and "Our Museum" programmes, both of which explored approaches to audience involvement in creative decision-making and evaluation (see (Ahmad & Cummins, 2016) and (dha, 2015a)).
- However, there have also been critiques of the quality of evaluation. These critiques centre on a lack of impact data (Arts Impact Fund, 2016) and the fact that often evaluations do not influence future practice or provide useful insights into the audience experience that can be used to inform future activities (Davies & Heath, 2013).

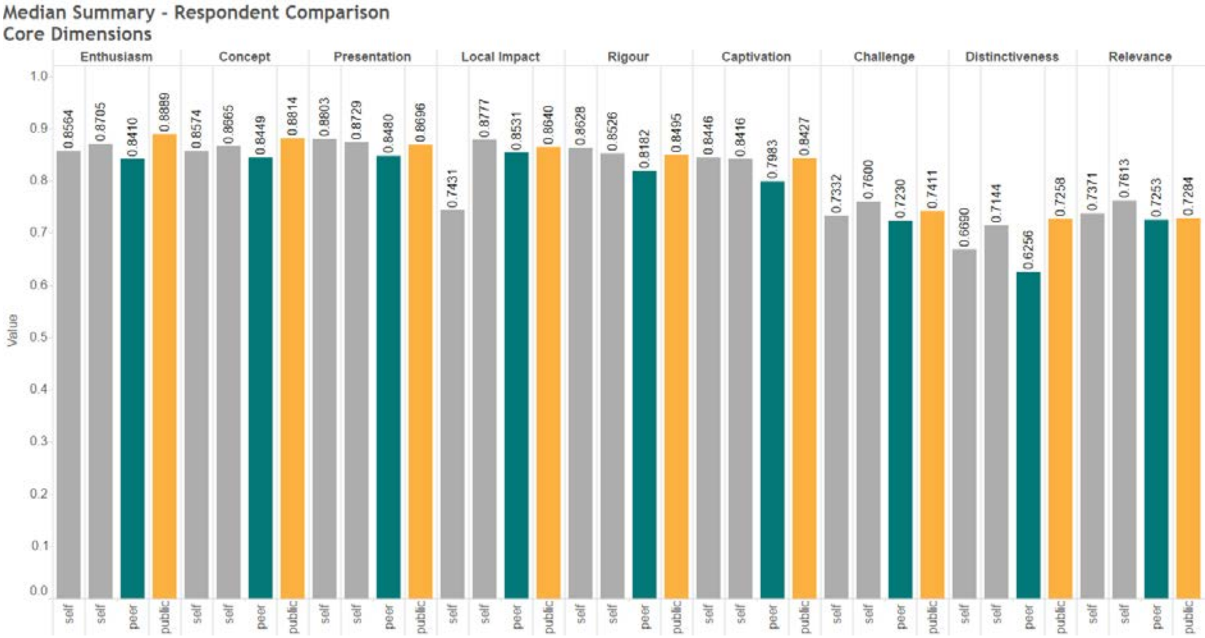
Arts Council England has developed and supported a number of initiatives to further the quality agenda.

2.3.1. Quality Metrics and the Impact and Insight Toolkit

- The Impact and Insight Toolkit – which, as of June 2018, is currently being developed – will *"provide National Portfolio Organisations and the Arts Council with insight into what audiences, participants, peers, artists and creative practitioners think about the work being produced across the national portfolio"* (Arts Council England, 2018a).
- The toolkit will build upon and supersede Quality Metrics – a sector-led project that used self, peer and public assessment to capture the quality of art and cultural work.
- Taking inspiration from a similar project in Western Australia, Arts Council England supported the development of Quality Metrics through two sector-led pilots in Manchester (2013/14) and the subsequent Quality Metrics National Test (2015/16).
- The Quality Metrics followed a set of statements, developed by arts and cultural organisations, which attempted to capture the different dimensions that contribute to a high quality artistic or cultural experience.
    - Concept: it was an interesting idea;
    - Presentation: it was well produced and presented;
    - Distinctiveness: it was different from things I've experienced before;

  - Challenge: it was thought-provoking;
  - Captivation: it was absorbing and held my attention;
  - Enthusiasm: I would come to something like this again;
  - Local impact: it is important that it's happening here;
  - Relevance: it has something to say about the world in which we live; and
  - Rigour: it was well thought through and put together.
- Quality Metrics was administered through a digital survey platform that enabled arts and cultural organisations to capture, analyse and compare responses from their audiences, peers and staff.
- The work surveyed received a broadly positive response from the people that experienced it, and largely met the creative intentions of the participating organisations. The metrics around challenge, distinctiveness and relevance, however, tended to receive more modest average responses than the others.
- Following two pilots that tested and developed the Quality Metrics with 8 and 20 participating organisations, respectively, the Arts Council trialled the framework with 150 national portfolio organisations. The national test phase ran from October 2015 to June 2016, with participating organisations evaluating programme activity between November 2015 and May 2016.
- The national trial resulted in 137 NPOs/MPMs completing 374 evaluations of nearly 20,000 public responses and over 700 self and peer responses (Knell & Whitaker, 2016).
- Nordicity were commissioned to evaluate the experience of participating in the test phase, through which participating organisations were expected to apply the QM and upload data through a single platform. The evaluation report (Nordicity, 2016) found that, although there were some shortcomings with the metrics and the platform, overall the sector was able to use the metrics and the platform and was willing to work with Arts Council England to resolve the outstanding issues.

Figure 9: Average self, peer, public responses



Source: *Quality Metrics Final Report*

- Use of the Quality Metrics is mandatory for Band 2 and 3 NPOs in the 2018-22 investment period, from April 2019.

2.3.2. Quality Principles

- The aim of the quality principles work is to raise the standard of work being produced by, with and for children and young people (Arts Council England, 2018b). Seven quality principles have been developed as a result of close collaboration between the Arts Council England and arts and cultural organisations that work with children and young people. The seven quality principles are:
  - Striving for excellence and innovation;
  - Being authentic;
  - Being exciting, inspiring and engaging;
  - Ensuring a positive and inclusive experience;
  - Actively involving children and young people;
  - Enabling personal progression; and
  - Developing belonging and ownership.
- Arts Council England commissioned two organisations, the National Foundation for Educational Research (NFER) and Shared Intelligence, to do real world testing of the Quality Principles in 2014. The testing was wide ranging. Fifty-one lead organisations tested the principles, working with 800 partner organisations and involving almost 9,500 children and young people. Arts and cultural organisations found a variety of innovative, flexible and creative ways to test the quality principles. Some organisations devised ways to capture feedback from children and young people, and others encouraged children and young people to evaluate their experiences. Use of the Quality Principles is mandatory for NPOs contributing to Goal 5 in the 2018-22 investment period.

- It is also worth noting that, prior to the Quality Principles, the Inspiring Learning For All (ILFA) framework for evaluation had been widely used in the cultural sector for self-evaluation purposes since 2004.
- There appears to be a gap in the literature in relation to children and young people's perceptions of quality in relation to arts and culture and the impact this may have on their participation.
- Research by NFER (Lord, Sharp, Lee, Cooper, & Grayson, 2012) to inform the Arts Council's quality principles for children and young people, articulates seven quality principles, however an interim evaluation by NFER and Shared Intelligence in 2015 (Sharp & Lee, 2015) was unable to determine any specific outcomes from pilot projects implementing the quality principles, despite indications that they were changing the way organisations were engaging with children and young people.
- An international study into children's engagement with museums (Johanson & Glow, 2012) argues for experience rather than learning as the central goal of museum engagement with children and a less instrumental approach to impact and outcomes. They argue that the experiences sought by adults in engaging with museums can also be achieved with children (e.g. pleasure, relaxation, learning, entertainment, solitude, self-actualisation and aesthetics) but that for children and young people, the social aspects of the visit have primacy. In their analysis of case studies of good practice in museum engagement with children they identify the following common characteristics: social interactivity particularly relating to family engagement, immersive experiences, and engagement through interpretive dialogue.
- Beatfreeks (2017) identify some factors young people may use to define quality of experience in their quantitative survey of young people in Birmingham. When asked what makes them go back to an event, 27% say 'experience and vibes', 25% say 'socialising' while only 15% say 'content'. This suggests that the criteria by which young people evaluate quality may be different to that used by arts organisations as a whole and also provides an indication of their primary motivations in participating in arts and cultural events.
- There is some evidence that Arts Award encourages participation, particularly among families from minority ethnic backgrounds that may not traditionally value arts and cultural education, because it is accredited and counts towards Ucas points (Hollingworth, Paraskevopoulou, Robinson, Chaligianni, & Mansaray, 2016).
- This is an area that merits further investigation, particularly taking into account the perception gap between young people's understanding of 'culture' and that accepted by institutions and organisations working to promote participation in arts and culture.

2.3.3. Artistic and Quality Assessment

- Artistic and Quality Assessment aims to provide *"a fair, robust and transparent way to discuss the quality of work"* produced by NPOs and MPMs (Arts Council England, 2018c).
- Assessments are carried out by a diverse pool of external assessors, whose role is to experience a piece of work from a funded organisation (for example a show,

concert, exhibition or publication) and write a report for the Arts Council assessing the quality of that work.

- Learnings are captured and shared as the programmes progress, and there have been a number of feedback events. NPOs have told the Arts Council that the assessment reports are a useful tool for self-reflection on the quality of their work and of the experience.
- 96% of NPOs were eligible for assessment in 2015/16, and the programme commissioned 827 assessment visits that year (Arts Council England, 2016a). This rose to 874 in 2016/17 (equating to 725 single standard assessments), demonstrating a significant increase from 317 visits in 2013/14.

2.3.4. Accreditation

- The Museum Accreditation Scheme is the UK industry standard for museums and galleries (Arts Council England, 2018d). It defines baseline standards for museums, to ensure that they are doing the right things to help people to engage with collections, and protect them for the future. The Museum Accreditation Scheme does this by making sure museums manage their collections properly, engage with visitors, and are governed appropriately.
- The scheme works for museums of all sizes: from the smallest volunteer-run museums to the highest-profile national museums. It’s not a one-size-fits-all scheme, with 1,720 participating museums (as of February 2018), the expectations vary to account for different types, sizes and scopes.
- As the development body for museums in England, Arts Council England uses Accreditation as the central tool for the development of both funded and non-funded museums.
- During 2017-2018 the Art Council England has undertaken an extensive review of the scheme in response to the feedback from the sector and to ensure it remains fit for purpose. This has shown that the sector values the scheme, and many believe that it has been transformative for museums over the last 30 years. The review has looked at the focus and content of the Standard, how it is managed and resourced by ACE, and the guidance and documentation will be refreshed for a relaunch of the Scheme in Autumn 2018.

2.3.5. Designation

- The Designation Scheme exists to recognise cultural collections of outstanding richness and resonance – collections that help deepen our understanding of the world, and what it means to be human. Designation is a mark of distinction. It identifies pre-eminent collections of national and international importance held in non-national museums, libraries and archives across England (Arts Council England, 2018e).
- Designation aims to raise the profile of the collection and increase access to funding and support, including Arts Council’s Designation Development Fund which, to date, has invested around £35 million towards ensuring that Designated collections are well looked after and widely accessible both for wide enjoyment and focused research.

- Since 1997 an independent Panel of experts, appointed by Arts Council, has identified 148 Designated Collections which are held in 120 organisations across the length and breadth of England.

2.3.6. Creative People and Places

- Creative People and Places (CPP) has come a long way in terms of its thinking, design and experience of delivering excellence in art and excellence in community engagement. Ecorys's evaluation of Phase 3 (2017) found that:
    - Excellence in art and community engagement is now understood by many Places as a continuum;
    - The best examples of unified excellence in art and community engagement come from CPPs that have consciously taken a holistic and multi-faceted approach to forge a mutually beneficial relationship between the arts and the community;
    - Achieving excellence requires a holistic view of quality in terms of the whole process and all those involved;
    - Achieving excellence is about ensuring that the community, artists and CPP team have time and space to openly reflect with each other and take on board feedback;
    - Quality processes are important so that groups can demonstrate that they are able to develop and deliver projects; and
    - Excellence is being embedded into everyday practice.
- There are ongoing challenges in achieving the right balance between curated and participatory approaches but CPP has provided the opportunity to pilot and refine these.
- There are 21 CPP projects across England. All CPP projects are reflecting on excellence and developing their own approaches to measuring excellence in their projects (Consilium, 2016a). Consilium describe the range of approaches taken, from participant-led approaches to approaches which invite comment and challenge from participants and peer advisors.

2.4. What a high-quality experience looks like

- Consilium's (forthcoming) evidence review of equality and diversity within the arts and culture in England (spanning 2013-16) also highlights issues around definitions of excellence in arts and culture: that traditional definitions of excellence and quality are exclusionary to a significant proportion of the public – particularly from lower socio-economic groups – and create a divide between creatives and non-creatives.
- The report references Holden's (2008) exploration of commercial, subsidised and amateur culture which highlights that there are areas of the cultural world where many feel alienated due to the power of cultural taste makers. Edelman, Šorli and Robinson (2014) explore these three spheres further through the lens of theatre and dance in Tyneside. Their study found that there was little difference in the audience experience between amateur and commercial performance and that whilst the quality

of amateur performance was considered to be slightly lower, audiences derived more enjoyment from watching the skill and labour of amateur performers 'just like them'.

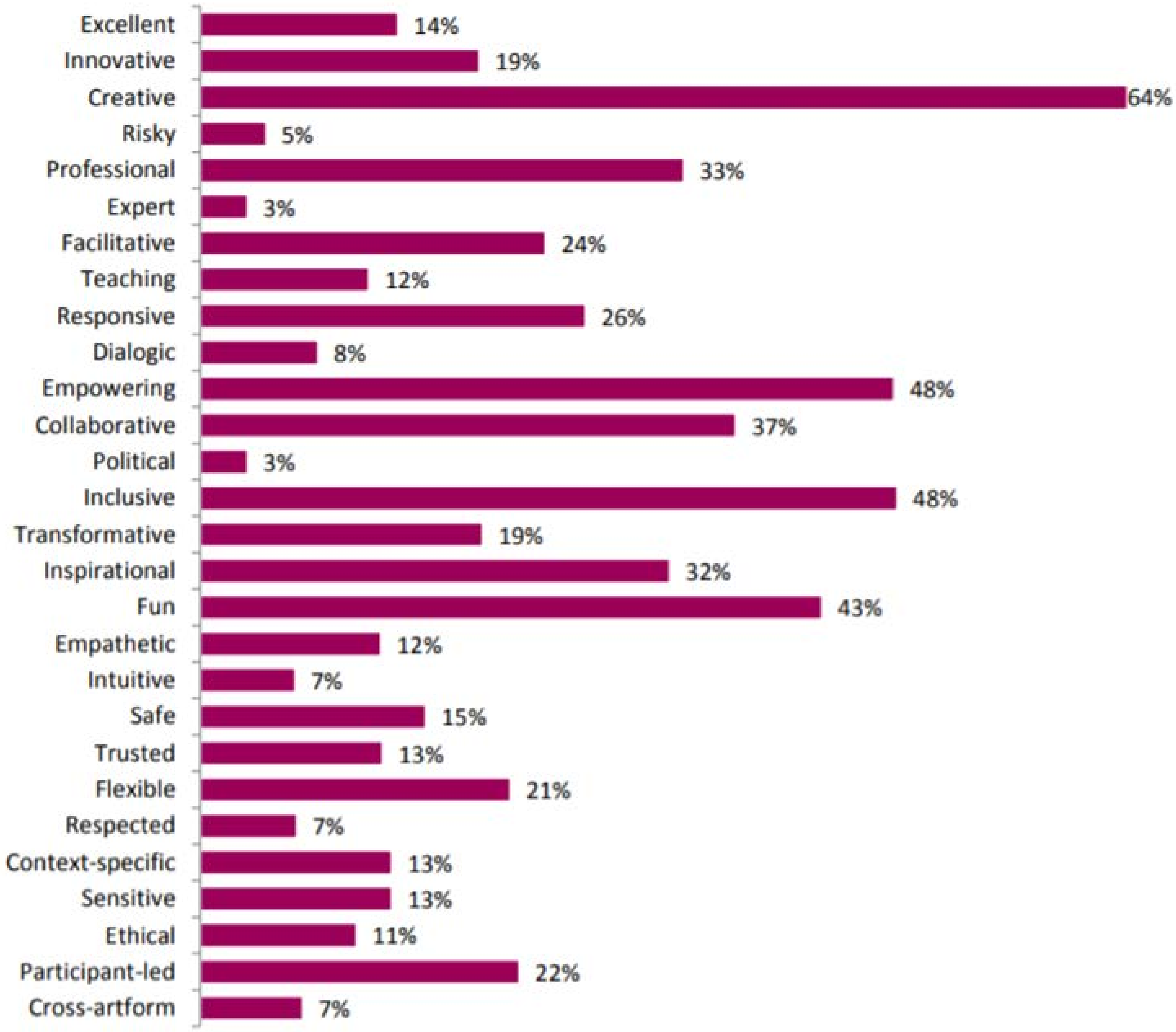
  - An interesting finding was that for commercial performance there was a correlation between deeper engagement with the performance and increased 'fun' whereas deeper engagement with subsidised work did not necessarily lead to an increase in 'fun'. The study also found that while novelty and innovation are important for arts funders, they are less important for audiences.

- Creative People and Places has provided a focus for considering traditional approaches to understanding quality from a more collaborative perspective, because of the participatory nature of the projects and the new audiences who have been engaged by this work. Creative People and Places (2015) notes that *"definitions of artistic quality are particularly contested within collaborative and participatory projects"*.
- Consilium's (2016a) thematic research around the Arts Council's Creative People and Places programme *What It Does To You* states that there is *"a recurrent sense that excellence is experiential, dynamic and contextual, based on the coming together of process, people and skilled execution of an idea".* The work suggests that because of this, excellence cannot be measured on the same basis everywhere, but suggests a set of core characteristics that many now agree can be used as indicators of quality. These are:
  - Relevance of an experience to those having it;
  - Rigour and skill in how it is delivered;
  - The content of the work or what is drawn from it; and
  - The captivation or challenge created.
- The report also highlights the role that factors such as education, class and cultural background play a key part in determining what people consider to be excellent or high-quality art, as well as validation from peer groups. A key theme appears to be the need to better understand excellence, quality and value through the lens of the different people experiencing the work and the situations in which they experience it.
- Robinson (2016) reflects on excellence in CPP. He notes that currently excellence is defined by *"breadth and choice in different routes to engagement"*. However, he also questions whether perceptions of excellence and quality will change among CPP communities as they become more experienced in the arts. This suggests that an evolving quality framework could progress from 'beginners' participatory excellence frameworks such as that set out by Burghes and Thornton (2017) in Liverpool or Consilium's analysis of excellence in CPP so far (Consilium, 2016a) and the Excellence Metrics that are currently being embedded by cultural sector organisations. However, Tiller (2017) questions this kind of narrative of progression, suggesting that it demonstrates the power and privilege still present in the 'top down' initiative that is CPP, despite its empowerment agenda.
- 64 Million Artists (2016) argue that *"language, attitudes and the prevailing 'excellence' narrative in the arts can be seen as divisive in terms of engaging a broader audience in arts and culture".* It argues this can discourage audiences who do not see themselves as 'creative' from engaging with the arts and culture.

Specifically, 64 Million Artists argue that words such as ‘fun’ and ‘play’ are undervalued by quality metrics, when they are strongly valued by the general public. The Artist’s Survey completed as part of the Paul Hamlyn Foundation’s “Artworks” programme also identified the following common definitions of participatory art as ‘creative’, ‘empowering’, ‘inclusive’ and ‘fun’ (dha, 2014).

Figure 10: Importance to practice in community, participatory or socially-engaged settings

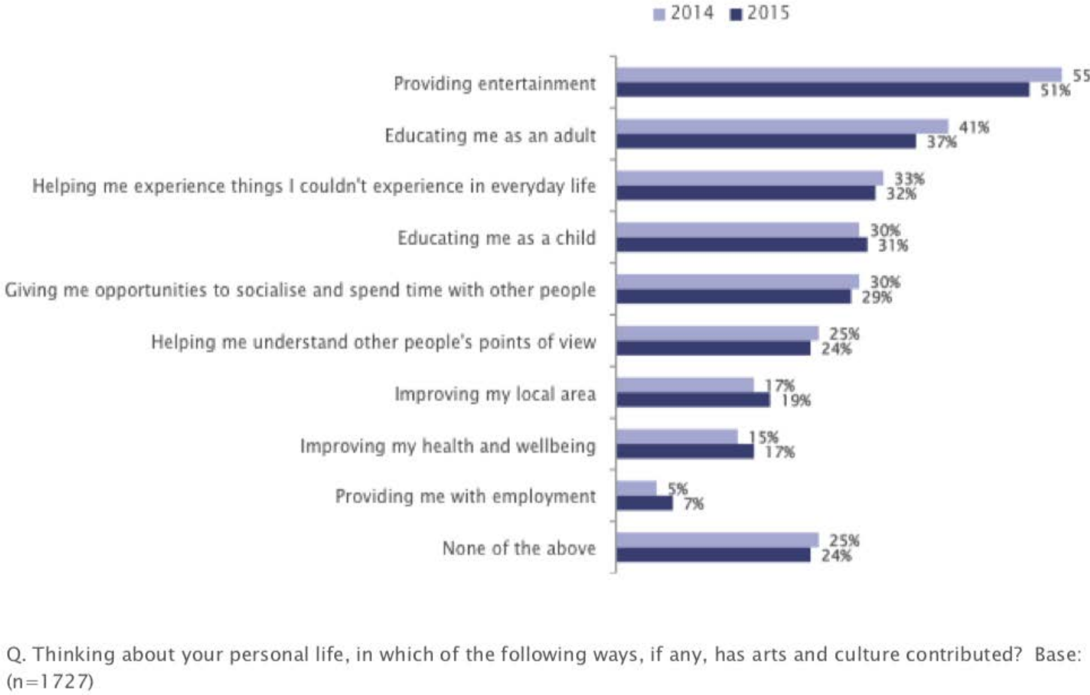
Thinking about your practice in community, participatory or socially-engaged settings, please select from the following words or phrases those which you feel are most important to this practice. Please select a maximum of six.



Base: 951
Source: dha

- This is supported by quantitative research of the public in England undertaken by ComRes for Arts Council England (2015). It found that arts and culture was seen by the majority (55%) of respondents as contributing to their personal life by ‘providing entertainment’.

Figure 11: Contribution of arts and culture to personal life



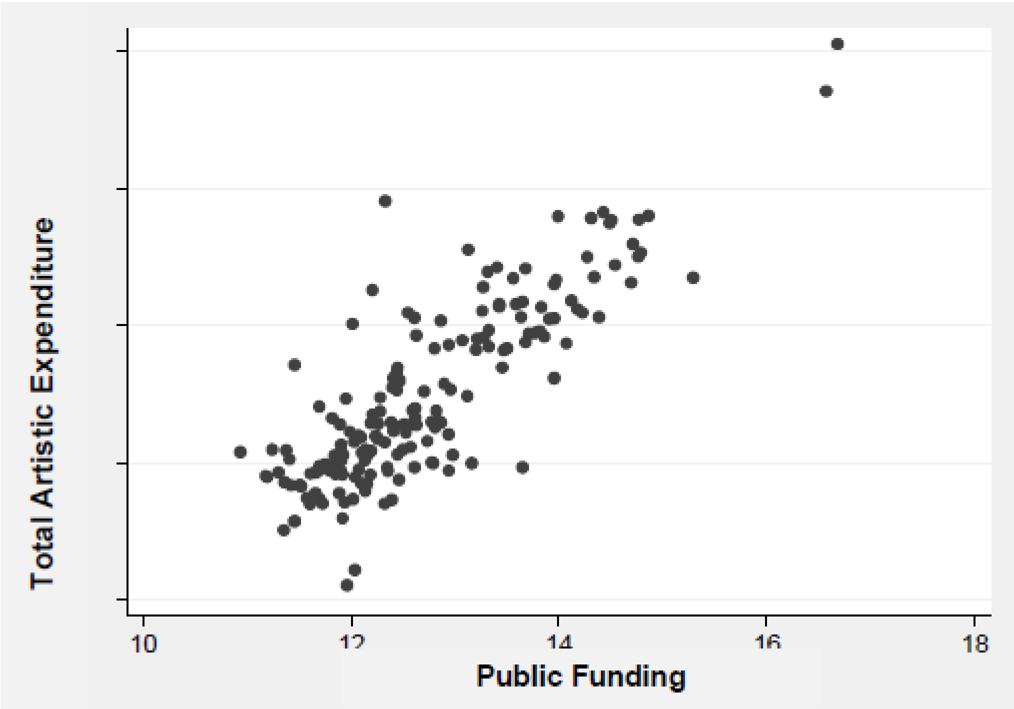
Source: ComRes, 2015

2.5. Enablers and barriers to producing high-quality work since 2010

- Across the reviewed literature, the most consistently referenced barrier to and enabler of producing high-quality work was the availability of public subsidy.[1]
- BOP's (2016) analysis of theatre in England, for instance, highlights concerns that reductions in public funding are limiting theatres' capacity to take artistic risks. A review of existing literature and data analysis on NPO funding demonstrated the importance of public funding in enabling organisations to be innovative and risk-taking, and to invest in new and high-quality work. The decrease in public funding, particularly local authority funding (cf. 4.3, below), endangers organisations' capacity for this sort of work, since commercial lenders are far less likely to offer financial support to *"projects which cannot demonstrate a reasonable likelihood of covering their costs"* (Cebr, 2013).
- The BOP (2016) report also shows that organisations with increased public funding tend to spend it directly on their artistic output: an increase of 10% in the total amount of public funding (Arts Council plus 'other public funding') contributes to a 6% rise in total artistic expenditure. The scatter chart below visualises the strong linear relationship between public funding and artistic expenditure, with organisations in receipt of higher Arts Council funding and other public subsidy spending more on artistic costs.

[1] Many recent publications also stress the benefit of free movement among EU nationals (and therefore the possible negative impact of Brexit); this is discussed below, 2.10.4.

Figure 12: Total artistic expenditure vs. public funding



Source: BOP Consulting/ Arts Council England (2016)

- In *The Interdependence of Public and Private Finance in British Theatre*, Hetherington (2015) suggests that if the current declining trajectory of subsidy to earned income continues, the nature of work produced and presented by theatre companies in receipt of subsidy is likely to change as they are restricted in their ability to take risks:

  "subsidy makes possible the creation and presentation of some theatre productions that would otherwise be financially impossible, but it also favourably adjusts risks that apply at various points across the financial life-cycle of all theatre works".

- A survey of 1,129 UK theatre employees focuses on individual careers and the movement of ideas, which show the importance of the subsidised sector for shaping high quality talent and innovative work. There was a high rate of labour mobility backwards and forwards between subsidised and commercial theatre, as well as elsewhere in the creative industries, notably in TV, film and advertising. Respondents emphasised the importance of subsidised theatre in providing the time for experimentation and new work (cf. Albert, Bakhshi, Mitchell, & Smithies, 2013 and Crossick & Kaszynska, 2016).
- Although much of the literature cites commercially successful theatrical productions as supporting evidence for the benefits of public subsidy, the trend may be seen across other artforms (Cebr, 2013) – though there is a lack of research that specifically considers them.

2.6. Talent development routes for artists in England

- This review did not find systematic evidence of clear and effective talent development routes for artists across artforms in England. Many HE and FE institutions provide courses in a wide range of arts and cultural practice. The important role of HE and FE institutions is considered by numerous studies into careers in the arts (e.g. Slater, Ravetz, & Lee, 2013; Friedman, O'Brien, & Laurison, 2017; O'Brien, Laurison, Miles, & Friedman, 2016; Brook, O'Brien, & Taylor, 2018, etc.). However, there is also critique of these institutions as 'gatekeeper' to the professions rather than enabler of creative professionalism (Slater, Ravetz, & Lee, 2013; Banks & Oakley, 2016).
- AHRC (Crossick & Kaszynska, 2016) emphasises the role of the total ecology of the creative sectors for talent development, including the permeability of the subsidised and commercial sectors, as talent moves between the two, bringing different experiences and skills to each. In doing so it rejects the idea of linear career development as a useful concept for artists and creatives.
- Linearity is questioned further by Oakley et al (2017), who argue that accredited qualifications can be less important in the creative and cultural industries (CCI), because many employers did not take a linear approach to their own careers and 'found their niche' after trying many other things before settling on the CCI. These employers' approach to identifying and nurturing talent among their own employees may therefore be equally idiosyncratic:

  "a culture of scepticism among employers [about qualifications] and reliance instead on demonstrated experience, or, on what might be called the 'guru' method, whereby people's credentials are established by the quality of those they have worked with, rather than by paper qualifications."

2.6.1. Visual arts

- There is a wide range of literature on artist development in the visual arts. A study commissioned by Chisenhale Gallery mapped artist development opportunities in the UK in 2015 (Gordon-Nesbitt, 2015) found both programmes designed to provide artist development (the report examines 16 exemplary programmes in detail) and the notion of commissions and exhibitions as practical opportunities for artists to develop their practice. The report calls on galleries and commissioners to be more explicit about the development opportunities involved in their commissions and exhibitions.
- In her study of the Castlefield Gallery's artist development programme, de Mynn (Mynn, 2017) breaks down the core offer into four categories:
  - nurturing an environment;
  - skills and knowledge;
  - resources that feed practical outputs; and
  - showcasing opportunities.

  These, she suggests, may be used as a prototype for expanding understanding of the sorts of activity offers that could be of benefit to artists at critical junctures in their careers.

- Slater et al (2013), provide evidence that supports the AHRC's position in their investigation of career paths for visual artists in Greater Manchester. They state that careers in the creative industries are rarely linear in trajectory and that this is actually supported by arts institutions, including the Arts Council (whose 2006 *Turning Point* publication they specifically reference). Slater et al also identify conceptual barriers to the idea of career progression, because *"some [visual] artists do not see their practice as a career at all; others see it as a secondary career that sits alongside a primary occupation that provides a more reliable income."* (2013) The report states that some artists are averse to the term 'continuing professional development' (CPD) because it feels too corporate and not aligned with their own visions of their artistic development. On the other hand, 'artistic development' (AD) is critiqued as both very broad (anything that supports an artist) and rather narrow in focus (primarily at the early stage of a career).
- Slater et al (2013) also identify that vehicles for professional development can actually act as 'gatekeepers' to careers in visual arts. These include HE and FE institutions (as mentioned above), artists' studio groups, professional curators and arts organisations that offer exhibition opportunities and residencies, etc. The report finds that as artists progress through the different gatekeepers, there can be a lack of clear progression for AD/CPD, especially for artists who get 'stuck in the middle ground'. It finishes by adapting an existing theoretical framework for AD/CPD for use as a guide for assessing the effectiveness of career development approaches and by calling for more co-ordinated provision of AD activities in Greater Manchester.

2.6.2. Other artforms

- There is a paucity of in-depth, formal research into CPD among artists across other artforms.
- One report – the Artists Survey (dha, 2014) conducted by the Paul Hamlyn Foundation's ArtWorks project – partially rectifies this lack, although is mostly focussed on artists who worked primarily within *"community, participatory or socially-engaged settings"*. This survey found that, where they do access CPD or AD, many artists are often required to cover the costs of their own time and training:
    - 64% of artists had covered the costs of their own time for training and development opportunities; and
    - 61% have paid for training and development opportunities themselves.
- By contrast:
    - 41% stated that an employer or commissioner had covered the costs of training and development;
    - 26% reported that an employer or commissioner had covered the costs of their time to participate in training and development;
    - 23% had received a grant to support the costs and time of training and development; and
    - 21% had received in-kind support from other artists and peers for training and development.
- Nevertheless, only 15% said they have not been able to or not chosen to take up training and development opportunities.

2.6.3. Community-based and participatory arts

- The final report of the ArtWorks project, which was designed specifically to meet the development needs of participatory artists, showed that artists want learning and development environments that reflect those they work in and that for the processes of initial training and continuing professional development need to match the work's own practices (Burns, 2015). In response to this, ArtWorks developed eight different programmes for artist development:
    - Open Labs (London);
    - Fellowships (London);
    - Peer Learning Project (North East);
    - Action Research Learning Groups (Cymru);
    - Connecting Conversations (London);
    - Critical Conversations (North East); and
    - Peer to Peer Artists Networks (Scotland).
- A number of tools were also developed to support participatory artists' development, which are housed in an online Knowledge Bank: http://www.artworksalliance.org.uk/knowledge-bank.
- This programme continued, with six other given grants through ArtWorks in 2015 (dha, 2017). These focussed on supporting new or enhancing existing networks, trialling models of CPD for artists working in participatory settings, and developing improved circumstances for collaboration and/or new work. Over the seven projects:
    - Two established new networks of artists;
    - Three extended the activities of existing networks (whilst incorporating new artists into them);
    - Six ran formal CPD programmes, from peer support and exchange to placements on 'live' projects; and
    - One focused on facilitating collaborations between artists and HEIs.
- AHRC (Crossick & Kaszynska, 2016) also explores the role of the amateur/informal arts sector in supporting professional arts. It finds evidence (Dodd, Graves, & Taws, 2008) that amateur arts have been shown to progress amateurs to professional work (notably in theatre) and providing income as well as skill diversification for professional musicians and performers, by employing them to augment amateur ensembles. It also cites Holden (2015) as describing a complex ecology of career development opportunities through state funded arts, commercial arts and other commercial opportunities that may exist in the broader creative industries for artists.

2.7. Enablers and barriers to talent development in England

- Seven themes are apparent from the literature reviewed in relation to barriers and enablers to talent development; financial, infrastructure and support networks, class, gender, disability, ethnicity, freedom of movement and support for mid-career as well as emerging artists. However, as with the issue of artistic progression, Oakley and O'Brien (2016) emphasise the intersectionality of different barriers to entry and progression in the arts. It is useful to think of the categories below therefore both individually and holistically, insofar as they may relate to individual experiences of creative career progression or lack of progression.

2.7.1. Financial

- In *Livelihoods of Visual Artists*, TBR (forthcoming) states that the *"main challenges faced by visual artists are a lack of financial return from their art coupled with a lack of time to spend on their artistic practice"*. Running their practice can be expensive and the majority of visual artists struggle to make a sustainable living from their practice. This leads them to take non-arts related work in order to survive, which in turn takes time away from their creative practice.
- A similar theme emerges in Canelo's (2017) *Literature in the 21st Century*, which cites factors such as a fall in print sales and book prices and lower advances as reasons it is difficult for fiction writers to make a living from their work. The research states that only the top 1000 UK writers will sell enough books to make a living from book sales and that the large literary prizes have become increasingly important.
- dha's (2015b) *Paying Artists* report states that less than half of artists and galleries think artists should always receive a fee, but some suggest funders should play a greater role on monitoring the pay of artists, as the expectation to work without payment preferences those that can afford it and potentially creates a barrier for those from lower socio-economic groups.
- TBR (forthcoming) also found that artists with degree educated parents tended to earn more from their practice but had also undertaken a greater amount of unpaid work experience.

2.7.2. Infrastructure and Support Networks

- Financial pressures appear particularly acute in London where living costs are higher, yet many artists choose to locate there due to increased opportunities, infrastructure and support networks. Artform-specific reports include TBR (forthcoming) for visual arts and Canelo (2017) for literature.
- As TBR (forthcoming) highlights, the most important factors for artists career development are *"the opportunity to exhibit, perform or publish at a critical time in their career, support from family/friends/peers and the artistic talent".* Peer networks are seen as crucial for artistic development both in terms of developing practice and discovering opportunities. These opportunities are greater in London, with visual artists in particular feeling that opportunities are limited outside of London and those artists based in London more likely to access opportunities locally and having a higher income compared to those artists in the regions who are competing for limited opportunities.
- Canelo (2017) asks us to consider the implications of a London centric literary sector through the lens of 'insider networks' and the impact these may be having on diversity. As Canelo states *"people work through networks which tend to cluster around people with similar backgrounds. This means that membership of the literary insider network, centred as it is amongst London-based, white and middle-class constituents, favours those already on the inside".* This analysis is echoed by Oakley et al (2017), in relation to the creative and cultural workforce in general. They identify

that *"rather than acting as an 'engine room' of social mobility, London's dominance in fact re-enforces social class disparities in cultural employment"*.

- ComRes (2016) sector dialogue highlighted a need for better infrastructure and support networks across the sector. In response to the idea of a separate Grants for the Arts budget line for individual artists the dialogue suggested this alone may not be enough to improve their success rate and that more needs to be done to ensure that the sector as a whole provides greater ongoing support to individual artists, including NPOs, locally-initiated funding workshops and support networks for artists. This would form a broader infrastructure, with NPOs playing a key role in supporting individual artists, and greater funding and support networks at a local level.
- It is necessary to educate future generations and encourage people from diverse backgrounds to aspire to a career in the creative and cultural sector; this will help to ensure a pipeline of talent with the appropriate skillset. However, if the number of schools and colleges offering creative art and design courses were to decrease, as well as the number of students studying these subjects, this could lead to a lack of effective information, advice and guidance on careers in creative industries, which, as Bowes et al (forthcoming) note, will threaten the development of the talent pipeline.
- There is a concern that students are not being taught the business skills and knowledge needed to fill the roles available in the cultural sector. Some fear that university courses are very academic, and do not teach the practical skills required for working in a museum or gallery.
- Bowes et al. (forthcoming) found that 33.3% of businesses report skill gaps, which could have an effect on the success of arts organisations as viable businesses. The most common gaps identified are:
    - Business marketing and communications skills (53.1%);
    - Problem solving skills (47.5%);
    - Vocational skills relating to business support occupations (45.0%);
    - Fundraising skills (43.8%);
    - Social media skills (40.0%).
- Furthermore, 30.2% of businesses report skills shortages, of these:
    - 45.0% struggle to recruit people with appropriate fundraising skills;
    - 35% struggle to recruit people with appropriate business marketing and communications skills.
- With regard to the talent pipeline, Bowes et al. (forthcoming) found that:
    - 63.0% of businesses do not have good succession plans in place in case senior leaders leave;
    - 88.4% of business leaders neither agree nor disagree that their organisation has a good understanding of what skills are required from their workplace;
    - 85.8% of business leaders recognise that technological change is important, but 37.2% of leaders are not confident in their ability to lead this.

2.7.3. Socio-economic group

- The above issues of finance and infrastructure / support networks also intersect with a third: socio-economic group. The evidence shows that this is a key factor in determining artistic participation (Department for Digital, Culture, Media and Sport, 2018b, forthcoming) and Oakley and O'Brien (2016) also find several studies exploring the relationship of socio-economic group to talent development and artistic production (Allen, 2013; Ashton & Noonan, 2013; Banks & Oakley, 2016; Bull, 2014; Scharff, 2015). Factors cited include: ability of parents to support children through Higher Education, networks and support infrastructure, ability to take on unpaid internships, lack of promotion of diversity in Art Schools and an equation of the ability to fit in with artistic merit and excellence. These findings suggest that 'excellence' can be an exclusionary term for those with a different approach to artistic production which may be linked to their cultural background.
- Brook et al (2018) argue that the creative and cultural professions have always been dominated by the middle classes, but that the general stagnation in social mobility is also reflected in these industries today. They cite two studies (O'Brien, Laurison, Miles, & Friedman, 2016; Oakley, Laurison, O'Brien, & Friedman, 2017) which suggest that the creative and cultural occupations are currently dominated by those from professional or managerial backgrounds, and used the ONS England and Wales Longitudinal Study (2011) and three birth cohort studies to evidence their claim. In addition, they find that a graduate with parents working in white collar occupations has nearly twice the odds of gaining creative work compared to a graduate from working class origins. Male graduates have a significant advantage over female, as do those from London, and those from ethnic minorities have reduced odds of working in the cultural and creative industries.
- Friedman et al (2017) present evidence that actors from working-class origins are significantly underrepresented within the profession and that even when those from working-class origins do enter the profession they do not have access to the same economic, cultural and social capital as those from privileged backgrounds and that they may suffer disadvantages in career progression in relation to negative type-casting and discrimination based on their accents.
- Oakley and O'Brien (2016) cite two studies of equalities in classical music production (Bull, 2014; Scharff, 2015) which emphasise the importance of social class in access to classical music education leading to careers in classical music (lower numbers of young people who learn to play classical musical instruments) and in personal responses to bullying and criticism and confidence in the classical music world which further disadvantage working class musicians.
- The Warwick Commission (2015) argues in its report that people from low income families with parents who have lower educational qualifications are less likely to be employed and succeed in cultural and creative industries. A number of studies argue that access to careers in the creative industries can be difficult due to the networked nature of the creative industries, e.g. (Oakley, 2011). Recruiters over-rely on degrees (Consilium, 2014) and unpaid internships are often the main way of breaking through (Warwick Commission, 2015). There is also a connection to age here, as cultural attendance diverges between young people from different socio-economic

backgrounds after the age of 16 when the organising and encouraging role of school ends for some (Bunting, 2013).

- The barriers for those with lower education qualifications are reflected in DCMS (2016) Creative Industries statistics which indicate that graduates are overrepresented in the arts and culture sector. More than half (59.9%) of jobs in the creative industry in 2015 were filled by people with at least one degree or equivalent, compared to 32.7% of all jobs in the UK. In 2015, 1 in 11 jobs in the UK held by graduates was in the creative industries. Between 2014 and 2015, there was an increase of 24,000 (2.2%) in the number of jobs in the creative industries held by individuals with at least a degree or equivalent. Across all industries in 2015, 62.5% of jobs in creative occupations were filled by someone who had at least one degree or equivalent.

2.7.4. Gender

- Fleming's (2017) showed that female musicians were being held back by sexism in the popular music industry, being recognised as performers rather than writers, producers and artists and a lack of female role models. *Women Making Music* played an important talent development role, helping build confidence and career development opportunities for female musicians, positively endorsing female talent and providing seed funding for developmental projects. Scharff (2015) finds similar issues in the classical music field with female musicians under-represented and concerns around sexualisation of female musicians. Consilium (forthcoming) explores Webb's research into the challenges experienced by women working in music and the performing arts sectors. The research highlights that the competitive nature of the sector, in part caused by an oversupplied creative labour market, is particularly challenging for women, especially mothers who can struggle balancing unpredictable work patterns and extensive travel with the financial and/or time demands of childcare. There is also evidence to suggest that females face a range of discrimination from exploitative contracts to inflexible career systems.
- Consilium (2013) found that women are underrepresented in creative positions. Females made up only around a third of artistic directors and actors and less than a quarter of creative crews. Consilium (2013) also explores research by Freestone and Kerbel into the role of female playwrights and the impact this has on opportunities for female actors. Freestone's research found that in 2011/12 only 35% of writers of new plays were women. In new plays written by women, 49% of roles were women compared to only 37% in new plays written by men.
- British Theatre Consortium, SOLT/UKTheatre, and BON Culture's report into British theatre repertoire (2016) supports this picture. It found that, in 2014, plays by women made up 31% of all new plays, with most representation in theatre for children and young people (38%) and least in translations (17%), demonstrating little statistical variation to 2013. Beyond the low numbers of individual productions, plays by women also play smaller houses than those by men (382 to 616 seats), for shorter runs (19 to 28 performances), and people paid less for tickets to see them (£18.79 to £27.59). In each of these categories, the situation had worsened since 2013. BTC also found that theatres are not reviving plays by women as much as they are reviving plays by men. Even in the modern and post-war eras, where there is a substantial amount of

plays by women to choose from, the work of one woman, Agatha Christie, represents 66% of the box office for all revivals of plays by women. On a more positive note, it found that in 2014, 57% of the new plays produced by England's two leading national companies, the National Theatre and the Royal Shakespeare Company, were written by women.

- Kerbel's (2012) research into youth theatre found that although participation in youth theatre is higher amongst females, there are insufficient female roles to accommodate them. This is leading to girls being regularly cast in male roles which practitioners fear is affecting factors such as confidence and body image, reducing the depth of engagement, reducing the appreciation for female voices and stories and impacting on the progression of girls into the theatre workforce.
- Parents and Carers in the Performing Arts' survey (Cornford & Whittaker, 2017), identifying barriers and challenges faced by people with caring responsibilities in UK Theatre, found that there were both employment and career consequences of caring and aspects of the long-established working culture of theatres that actively disadvantage and exclude people with caring responsibilities. The research also revealed that women are more likely to take on caring responsibilities and be perceived as caregivers and therefore are more likely to experience barriers and challenges.
- TBR's (forthcoming) research states that whilst there are more women as a proportion of all visual artists (71%) than in the England workforce as a whole (47%) women spend less time on their practice, and earn less on average from their art than men do. Consilium (2014) report that in commercial galleries only 31% of work is from female artists.

2.7.5. Disability

- A report for The Mighty Creatives (Green & Newsinger, 2014) highlights the fact that disabled people are particularly underrepresented in the creative workforce – corroborated by a 2014 survey which showed that 5% of the creative industries' workforce consider themselves to be disabled (Creative Skillset, 2015). This is 6 pp less than the figure for all industries in the UK economy (11%).
- Those disabled artists working within the industry face unique difficulties. According to a TBR (forthcoming) survey of visual artists with a disability, 33% cited access as a particular barrier and 16% of respondents said they had faced discrimination. Factors such as these are likely to limit the length and success of disabled artists' careers.
- Consilium (forthcoming) cite research by Potter (2015) in which disabled artists outlined *"professional mentoring and coaching, funding and/or financial support and support with exhibiting, performing and selling work"* as necessary support for their artistic development. The report also highlighted that earning income from their practice can be challenging for disabled artists and writers in receipt of benefits, leading to decreased motivation to seek paid employment and professional opportunities. Consilium also highlight concern that a lack of awareness among employers about reasonable adjustments and the high levels of informal employment practices in the arts and cultural sector are having a detrimental impact on the career opportunities of disabled artists.

- Research by the Institute of Conservation (Icon) found that 2% of professional conservators were disabled; disabled people were under-represented in conservation (Aitchison, 2013).

2.7.6. Ethnicity

- A number of studies suggest BAME students face a series of challenges getting into careers in the arts. Overall, 14.8% of all (UK domiciled) undergraduate students in 2015/16 doing creative arts and design courses were from ethnic minority backgrounds. The most popular subjects with UK BAME students were medicine and dentistry, followed by law, business studies and computer science, where they represented up to a third of all students (Higher Education Student Data, 2017). In addition, feelings that art may be 'vocationally irrelevant' seem to follow patterns related to ethnicity as well as gender and socio-economic status (Etherington, 2013).
- Canelo's (2017) *Literature in the 21st Century: Understanding Models of Support for Literary Fiction* highlights issues around the low representation of BAME writers and publishers. The report cites low pay, unpaid internships and insider networks as contributing factors, although it could be argued these are as much to do with socio-economic background as ethnicity. Perhaps more pertinent issues for BAME writers are around perceptions that the literary fiction sector is not receptive to BAME writers, and when it is, those writers are expected to be 'authentic', writing about their 'different' experiences and in a particular style. This can also lead to greater financial pressures, with the 'niche' writing of BAME authors not selling as well as more popular crime or thriller fiction more likely to be written by white authors. Work to counteract this is underway with The Guardian/4th Estate creating a BAME short story prize and BAME literature professionals launching the Jhalak Prize for the 'book of the year by a writer of colour', in 2017.
- Low pay is also cited as a barrier in Bold's forthcoming publication (2018), but there is also a crisis of representation to inspire young authors in the first place: as one writer put it, *"If no one is showing our BAME adolescents that there are authors that look like them that are creating then they won't know they can do it themselves".*
- TBR (forthcoming) found that the percentage of visual artists that are from BAME backgrounds (6%) is lower than the national workforce averages. 24% of BAME artists identified discrimination as a barrier.
- Research by Icon (Aitchison, 2013) found that black and minority ethnicities were significantly under-represented in conservation, as 97% of professional conservators were white.

2.7.7. Support for mid-career as well as emerging artists

- BOP's (2016) *Analysis of Theatre in England* and ComRes' (2016) sector dialogue both highlight a need to support the development of mid-career workers as well as emerging talent and note that a number of theatres have developed programmes to facilitate this. It is felt that although supporting emerging artists is important, it should not be seen as more important than supporting artists at any stage of their career to make the step to the next level or to take risks and change direction. In response to some of these issues, Aldeburgh Music staged a talent development, supported by the Arts Council. This identified a number of strategic tasks for talent development including advocacy; the dissemination of successful models; and a mapping exercise of what exists now (or might be developed). It further proposed that large organisations nurture small ones as well as dialogue – with Sector Skills Councils and the education sector – to bridge the gap between HE and the cultural workplace.

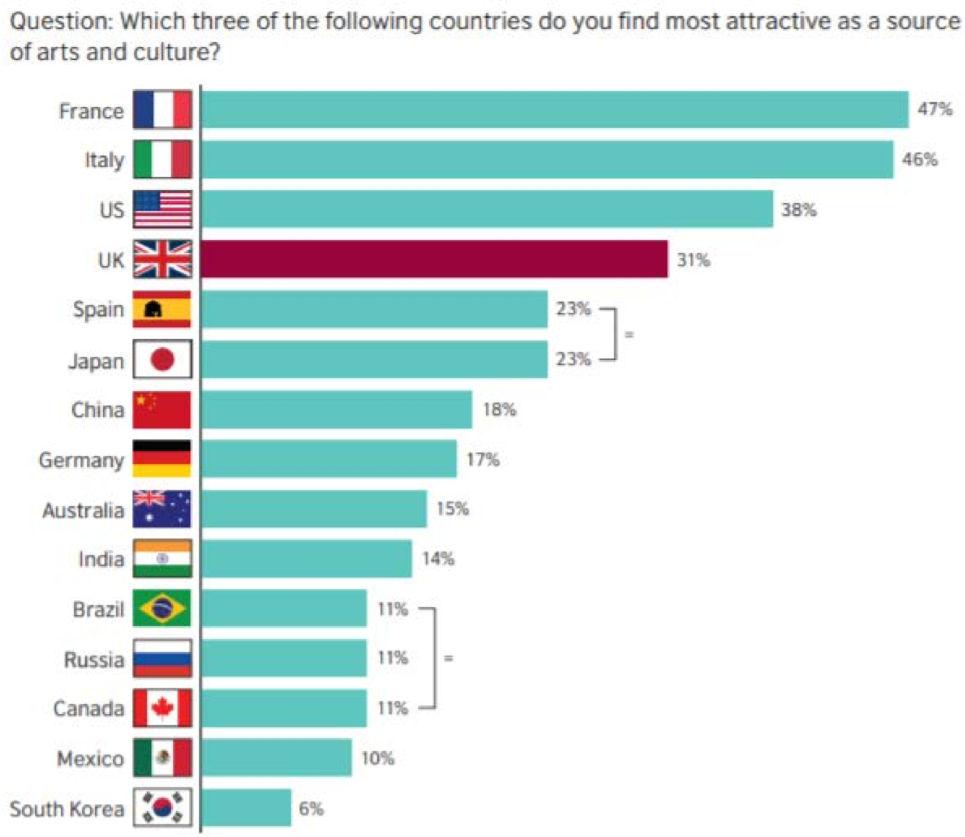
- The perceived lack of support for mid-career workers in the creative industries could contribute to the relative lack of churn in leadership positions in some arts organisations. Current leaders (2018) in Arts Council England's top 48 NPOs have been in post, on average, for 8.5 years.
    - This compares to an average of 4.8 years for CEOs in large UK businesses. 17 of 45 NPOs have had the same person in charge since at least 2008, while 19 have only had 2 people in charge over the last 10 years.
- However, there was a question over the terminology used to describe career stages – and thus its applicability to determining pathways and support programmes – since this is far harder to quantify for artists. Labels such as 'emerging' or 'mid-career', for instance, are often autonymic, or tied (inaccurately) to age. Slater (2014) found that:

  "defining one's career stage seems to become more complex as an artist reaches their late twenties. This is the time in more traditional careers when individual workers might expect promotions or clear paths or career development to occur. For artists, and other protean career workers, a lack of career trajectory means this is simply not the case. This show that while the notion of an 'emerging' career is often associated with youthfulness, this is not and should not be the case."

2.8 International Perceptions of the quality of English arts and culture

- VisitBritain's analysis of the Anholt GfK Nations Brand Index, which ranks 50 nations each year based on findings from an annual study amongst 20,000 consumers in 20 panel countries around the world, found that in 2016 the UK retained 3rd place as a nation brand, behind the USA and Germany (VisitBritain, 2016).
- The overall nation brand is made up of scores for six dimensions: Tourism, Culture, People, Immigration-Investment, Exports and Governance. The UK features in the top ten for all of the dimensions and comes 5th out of 50 countries for Culture. Our strongest Culture element is for "contemporary culture", ranked 4th, with our "cultural heritage" ranked 7th out of 50. Both of these attributes have dropped one place since 2015.
- Despite the strong national brand association with culture it should be noted that in the YouGov Brand index there are no arts and cultural organisations in the overall rankings or relevant categories of leisure and entertainment or charities. The British Council (2014) ranks the UK as 4th, behind the USA, France and Italy for arts and culture.

Figure 13: The attractiveness of countries for their arts and culture



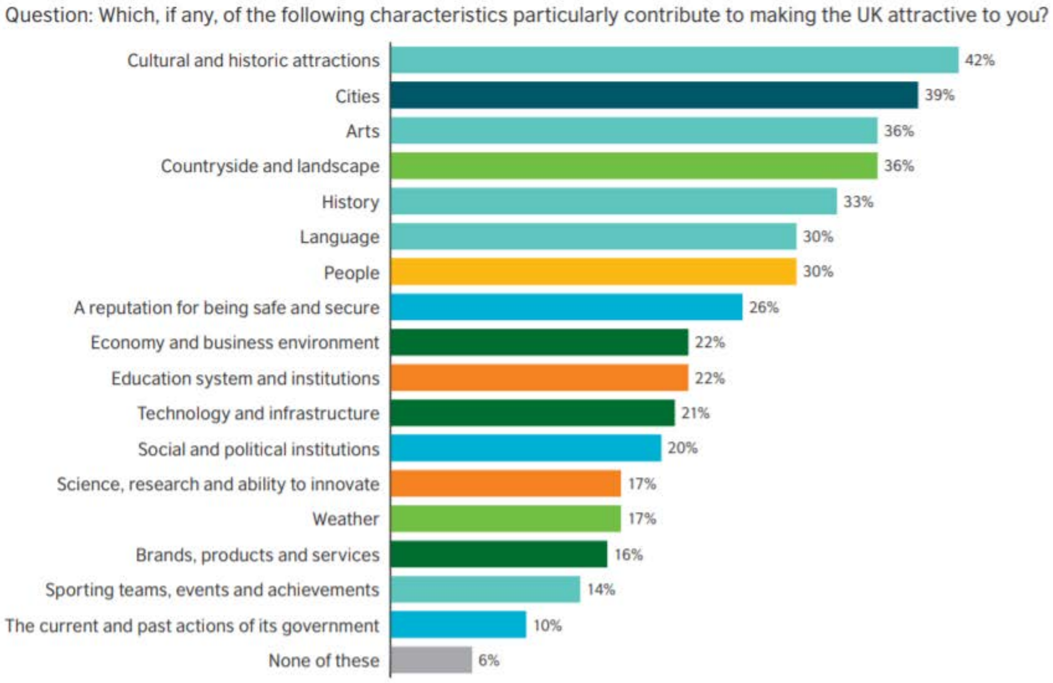
- The Portland *Soft Power 30* (Portland, 2017) placed the UK in second place globally for soft power (with a score of 75.72), behind France (75.75) and ahead of the United States (75.02). The 'Soft Power Index' is made up of six sub-indices which include culture, digital, education, engagement, enterprise and government.
- The report finds that the UK's strengths lie across the engagement, culture, education, and digital sub-indices.
- Yet whilst the *Soft Power 30* may be seen as a good example of a soft power index, a report commissioned by the British Council critiques Portland's approach to understanding international influence because it relies more on a catalogue of assets than an analysis of whether those assets are being best leveraged to create desired outcomes (Singh, MacDonald, & Son, 2017). The report suggests that, while the UK may have strong cultural assets, we need to act quickly to ensure we are not overtaken by others.
- This is borne out, for instance, by the fact that a report comparing views of museums around the world found the main factor holding back the British Museum's reputation was a lack of clear vision for the future (Van Riel & Heijndijk, 2017).

2.8.1. Arts and culture as a reason for international tourists to visit England

- BOP's (2016) *Analysis of Theatre in England* discusses the uniqueness of London's theatre sector, citing New York as the only other city in the world with a comparable infrastructure and appeal. The West End theatres attract large numbers of domestic and international tourists. It is estimated in the region of 30% of West End audiences are from oversees, however these visitors are less likely to visit Arts Council funded NPOs.

- The British Council's (2014) *As Others See Us* report shows that arts and culture are key factor in the UKs attractiveness to international visitors, and alongside sport, cities, language, history and education, and more important for the UK in comparison to other countries.

Figure 14: The factors making the UK attractive



- VisitBritain's Inbound culture, heritage and attractions research reiterates that Britain is recognised as a world class destination for culture and heritage, and these are cited as primary reasons for many overseas visitors to visit Britain. The below table shows figures from the 2011 International Passenger Survey demonstrating that 27% of all visits involved visiting a museum or gallery and 9% going to the theatre, opera or ballet.

Figure 15: International visitors' engagement with arts and culture

Activities asked about	Visits which involved activity			Nights spent in UK*	Amount spent in UK*
	Visits (000)	**% of all visits**	**% of holiday visits**	**Nights (000)**	**£(m)**
Visited museums or art galleries	8,299	27%	43%	86,146	£6,255
Went to theatre / musical / opera / ballet	2,796	9%	14%	33,838	£2,748
Visited castles or historic houses	8,874	29%	48%	91,245	£6,506

Visited religious buildings	6,738	22%	35%	74,920	£4,948
Visited parks or gardens	11,081	36%	54%	114,312	£7,826

** By those whose visit included the activity. Nights and spend are not specifically whilst under-taking activity but throughout visit to UK*

Source: International Passenger Survey, 2011

- VisitBritain's Foresight report (2016) found that Britain's cultural events and attractions were the third most popular reason to select it as a holiday destination. Britain also scored third overall in the competitive set (of France, Germany, Spain, Sweden and Ireland) for cultural events and attractions, behind France and Spain.

Figure 16: Perceptions of holiday destinations

"We would like you to think about France, Britain, Sweden, Germany, Spain [*and Ireland where applicable*] as holiday destinations. Please read each of the following statements and select which destination or destinations you think each statement applies to." (% indicates proportion of respondents agreeing that each statement applies to that destination)

Average agreement	Britain	France	Germany	Spain	Sweden	Ireland*	None
Has a rich and interesting history	46%	50%	39%	43%	26%	42%	15%
Is a mixture of old and new	42%	41%	35%	37%	25%	36%	17%
Has lots of cultural events and attractions	40%	48%	34%	42%	24%	34%	18%
Has fascinating stories, myths, and legends	37%	31%	30%	31%	26%	51%	20%
Has an interesting mix of cultures from around the world	37%	34%	24%	29%	18%	18%	26%
Offers lots of different experiences in one destination	37%	41%	30%	40%	26%	32%	21%
Inspires me to visit	35%	37%	29%	37%	33%	44%	19%
Offers authentic experiences	33%	38%	32%	38%	32%	41%	23%
Is a safe destination	32%	23%	32%	31%	43%	45%	25%
Is a fun place to be	32%	35%	25%	46%	26%	33%	19%
Is stimulating and exciting	32%	36%	27%	38%	26%	35%	22%
Is rich in natural scenic beauty	31%	39%	31%	40%	45%	60%	15%
Has good customer service	31%	29%	32%	28%	32%	31%	28%
Is a luxurious holiday	28%	39%	23%	26%	29%	13%	26%
People are welcoming	26%	26%	23%	41%	32%	45%	21%
Is easily accessible for those with disabilities	25%	22%	27%	20%	26%	19%	43%
Offers good value for money	22%	22%	21%	33%	18%	21%	34%
Is a relaxing destination	21%	31%	18%	36%	34%	38%	19%
Is a romantic destination	17%	56%	13%	29%	20%	29%	17%

*Ireland was only included for British, French, German and Swedish respondents so that they did not answer about their own country

Source: GFK Anholt Nation Brands Index 2016, VisitBritain sponsored question. Base: 14,238 respondents in 13 markets.

11

- In a study examining the impact of Brexit, the British Council (2016) found that, since the referendum, young people (18-34 year-olds) in the EU felt more negatively about the UK than those globally, both in terms of likelihood to engage with arts and culture and the UK's attractiveness overall:
    - While 16% of EU respondents were 'less likely' to engage with UK arts and culture as opposed to 6% 'more likely', this was reversed globally (11% of global respondents were less likely to engage, and 17% more likely).
    - The G20 countries (non-Commonwealth) were particularly positive, with 21% more likely to engage and 9% less likely.
    - EU respondents felt that the UK was now less attractive overall (36% said Brexit had a 'very negative' or 'fairly negative' impact on their opinion, as opposed to 17% 'very positive' or 'fairly positive'), whereas the opposite was true globally (32% positive and 21% negative).

2.8.2. International export and partnerships

- Analysing data from the ONS, The Centre for Economics and Business Research (Cebr, 2017) estimated that, including tourism spend in the UK on arts and culture activities, almost £5.2 billion of arts and culture-based goods and services were exported from the UK in 2013, of which 84% was non-EU. An estimated £5.4 billion of arts and culture-based goods and services were also imported into the UK in the same year (though figures for the EU/non-EU split were not available).
- SDG Economic Development (2017), drawing on DCMS reports,[2] found that exports in the CCI are growing year on year. While the creative industries outpaced the UK average growth (25.6%) by 9 pp, growth in cultural sector exports was slower.

Figure 17: Exports of services by Creative Industries and Cultural Sector (2010 to 2014)

Sector	Exports of services £bn					% change since 2010	% of UK total 2014
	2010	2011	2012	2013	2014		
Creative Industries	14.7	15.5	17.3	17.9	19.8	34.6	9.1
Cultural Sector	5.1	4.6	4.9	4.8	5.4	6.8	2.5

Source: SDG Economic Development, 2017

- However, exports in both sectors outpaced imports in both the cultural and creative industries.

Figure 18: Imports of services by Creative Industries and Cultural Sector (2013 to 2014)

Sector	Imports of services £bn		% change since 2013	% of UK total 2014
	2013	2014		
Creative Industries	7.9	8.7	9.7	6.6
Cultural Sector	2.4	2.5	4.9	1.9

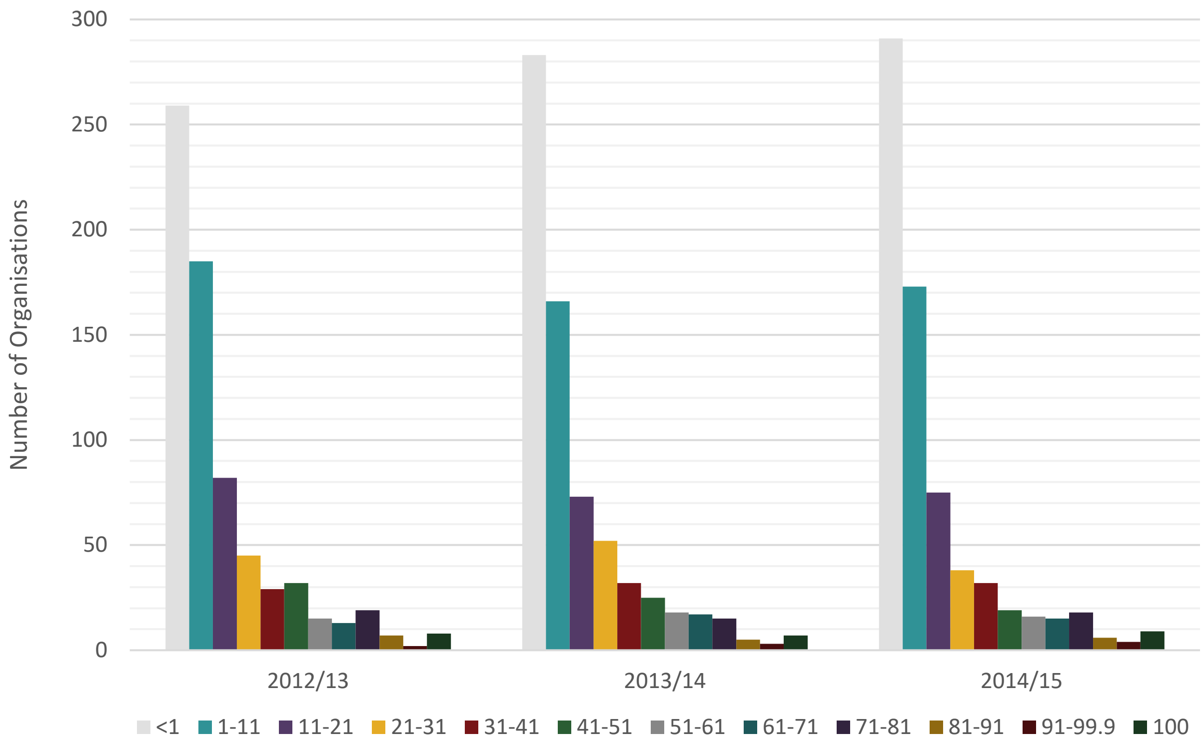
Source: SDG Economic Development, 2017

- Of the literature reviewed as part of this report, there is a lack of evidence about the role that quality plays in the export of cultural and artistic products. Existing literature on this topic (such as Nesta, 2016; DCMS Select Committee, 2017) focuses on the UK and specifically London attracting businesses and talent.
- Analysis of the data from annual surveys of NPOs and Major Partner Museums (MPMs) shows that on average between 2012/13 and 2015/16 around 15% of NPO/MPM activity had an international dimension. The table below demonstrates that for a large number of organisations less than 10% of their work has an

[2] These data on the value of CCI exports/imports are only for the years up to and including 2014 (published 2016); DCMS has not made more recent updates available.

international dimension, and in the region of 250-300 NPOs have no international dimension to their work.

Figure 19: NPO incoming international activity

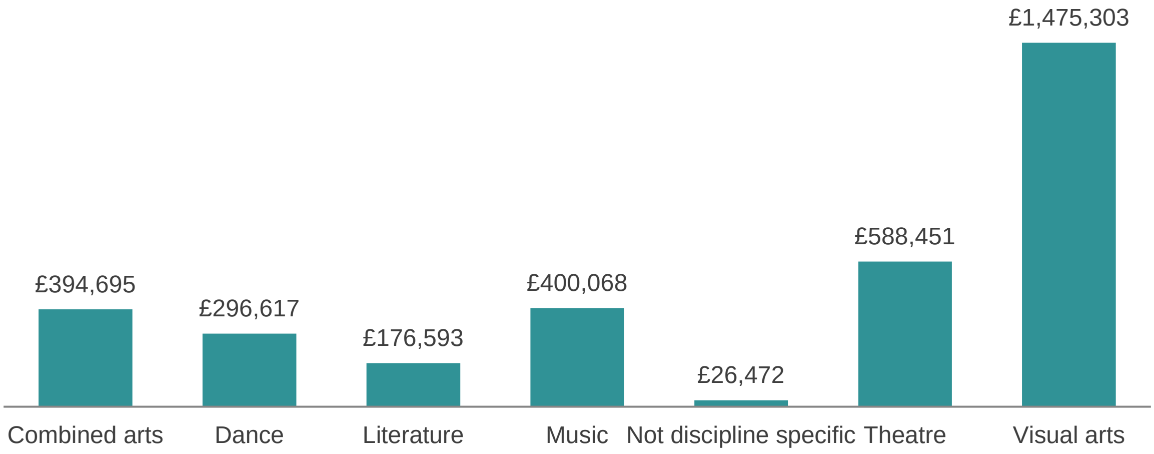


Source: Arts Council England annual NPO survey 2012/13-2014/15 [3]

- Through the Artists' International Development Fund, the Arts Council also invested in individual artists to develop skills, expand horizons and introduce an international perspective to their work. The fund aimed to offer artistic and/or market development for artists and creative practitioners, develop a cohort of artists and creative practitioners who have experienced the benefits of international working between the UK and other countries, and who advocate for it among their peers and increase the amount of international collaboration among artists and/or creative practitioners between the UK and other countries. £3,358,199 has been invested in 788 projects across Rounds 1-16, with the proportion of total investment in each round corresponding to the number of applications, in other words – investment was very much proportionate to demand for each artform.

[3] Note that the Arts Council altered their data gathering for the 2015/16 survey, so comparative data is only available for these three years.

Figure 20: Value of AIDF awards (Rounds 1-16), by artform



Source: Arts Council England AIDF funding data

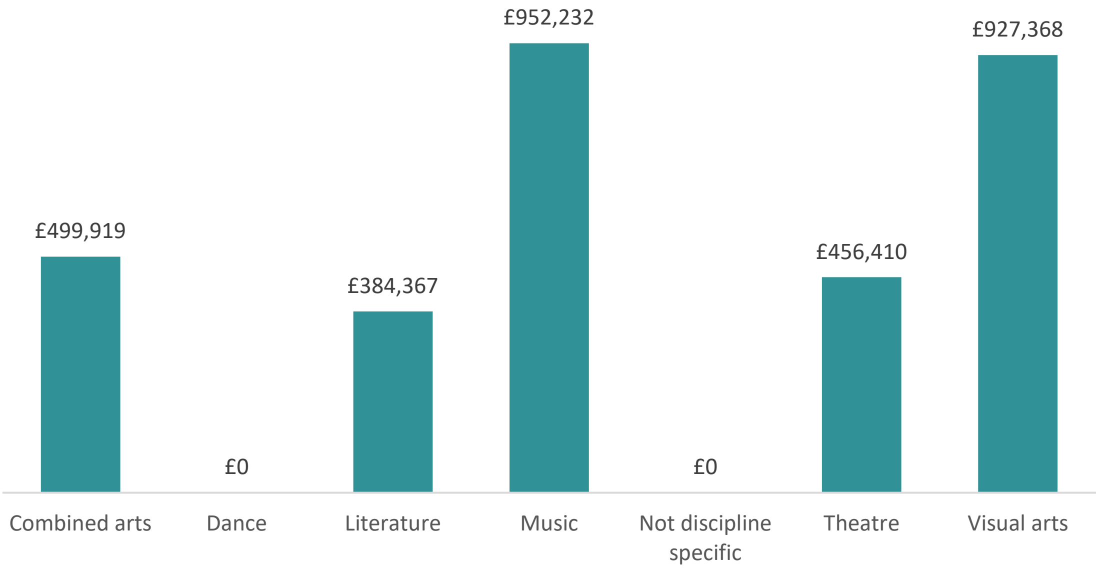
Figure 21: Value of AIDF awards (Rounds 1-16), by award round

Round	Awards		Awarded amount (£)		Average award (£)
1	25	3%	100,996	3%	4,040
2	26	3%	93,675	3%	3,603
3	22	3%	86,347	3%	3,925
4	20	3%	65,089	2%	3,254
5	35	4%	144,542	4%	4,130
6	52	7%	225,901	7%	4,344
7	51	6%	207,358	6%	4,066
8	34	4%	165,477	5%	4,867
9	70	9%	302,778	9%	4,325
10	54	7%	240,062	7%	4,446
11	72	9%	315,242	9%	4,378
12	65	8%	254,498	8%	3,915
13	65	8%	262,008	8%	4,031
14	86	11%	381,168	11%	4,432
15	52	7%	240,931	7%	4,633
16	59	7%	272,127	8%	4,612
Total / Average	**788**		**3,358,199**	**100%**	**4,262**

Source: Arts Council England AIDF funding data

- Arts Council England's International Showcasing fund was developed to showcase new overseas markets and audiences for art and culture from England. From 2014/15 to 2016/17, the Arts Council invested over £3.2m in 18 awards. It is not clear as yet from the available evidence what impact this has had on exports in the sector, however Arts Council England is currently in the process of undertaking an evaluation to understand this.

Figure 22: Value of International Showcasing awards, 2014/15 to 2016/17, by artform



2.8.3. Change in the number of international partnerships and creative collaborations since 2010

- There is a lack of data exploring whether international partnerships and creative collaborations have increased since 2010.
- Analysis of National Portfolio annual survey data shows that the percentage of NPO activity relating to international touring has fallen from 11.8% in 2012/13 to 8.7% in 2015/16. Despite this, the percentage of NPO/MPM income from international touring has risen from 4.7% to 18.8% over the same period.

Figure 23: International touring by NPOs

	International Tours (no)	International Tours (% of touring activity)	International Tour Dates (no)	International Tour Dates (% of touring activity)	Box Office Income from International tours	Percentage of touring income from international tours
2012/13	937	11.8%	9709	18.9%	£2,762,538	4.7%
2013/14	965	10.8%	10277	22 %	£501,275	0.5%
2014/15	1107	11.9%	11460	23.2%	£523,790	0.5%
2015/16	604	8.7%	7852	18.3%	£9,307,405	18.8%

Source: Arts Council England annual NPO survey 2012/13-2015/16

2.8.4. Enablers and barriers to international exports/internationally collaboration

- TBR's (2016) *International activity of arts and cultural organisations in 2014-15* found that 65% of the 426 NPOs surveyed had undertaken international activity between 2012/13 and 2014/15, with 55% involved in international work in 2014/15. NPOs are largely increasing the variety and amount of international work they undertake. The nature of their work includes UK artists undertaking residencies abroad (28%); hosting foreign artists (46%); touring (47%); undertaking co-productions (59%) or taking UK artists abroad (61%). A higher proportion of dance, literature and visual arts NPOs are working internationally than combined arts, music and theatre, although the latter three had higher numbers of organisations overall.

- NPOs identified a number of benefits to working internationally including improved reputation, artistic and professional development and being a part of the international arts landscape. Interestingly, reputation was also considered a key factor in opening up opportunities for international working, alongside existing relationships and experienced staff. Financial returns were not seen as a key benefit or driver of international working; however, lack of financial resources, time and staff were identified as key barriers. In relation to non-NPOs, the CIF (2016) *Brexit Report* highlights that international touring counts for a significant portion of turnover for many artists and performers.
- Consilium's (2016b) evaluation of the Arts Council's Artists' International Development Fund 2012-2015 found that the fund had helped artists enter new markets, and in many cases led to subsequent trips to the same country and/or new territories. Most artists supported through the fund gained confidence and practical and logistical experience such as securing visas and learning about import/export regulations and around two thirds established international networks to support future work.
- Creative Industries Federation and Arts Council England both commissioned reports into the perceived impact leaving the European Union would have on the sector, shortly after the vote in June 2016. The Digital, Culture Media and Sport Select Committee also investigated the potential impact of Brexit on the creative industries, tourism and the digital single market. Key findings are presented below.
- **Freedom of Movement:**
    - CIF (2016) report that, due to membership of the European Union, it is currently simple and relatively inexpensive both for UK venues and festivals to programme European artists and performers and for UK artists and performers to tour within Europe, making the planning and implementation of high-quality work far easier for organisations. Equally, in relation to popular music, the low cost and limited administrative burden of European touring plays a key role in developing UK artists into exportable acts. The report states that initial tours are rarely profit-making, but act as a spring board for more profitable second tours at a later date.
    - Restricting freedom of movement, therefore, is likely to increase costs and administration both for importing and exporting talent. European touring contributes significant income for many artists and performers, and any change to this could impact on their ability to operate within the UK. The CIF (2016) report, for instance, cites Manchester International Festival's expression of fear that loss of freedom of movement will discourage international acts and negatively affect its ability to programme high quality work. Arts Council England's (2016b) report reiterates these points, also highlighting the danger of increased difficulty in bringing artists and

organisations into the UK. They also felt that the increased administration burden could impact their business models.

  - The DCMS Select Committee report on the impact of Brexit (Digital, Culture, Media and Sport Committee, 2018) attempts to quantify the numbers of EU nationals currently employed in the creative and digital industries. It estimates the proportion at between 6-10% of the workforce, although the figures are contested, and these may vary considerably by location. The Committee heard evidence that foreign workers are required to fill vacancies and ensure access to the highest quality performers.

- **Funding:**
  - The DCMS Select Committee Report into the potential impact of Brexit on the creative industries, tourism and the digital single market (Digital, Culture, Media and Sport Committee, 2018) CIF (2016) and Arts Council England (2016b) all highlight concerns from the sector around access to European funding including Creative Europe and Horizon 2020. The DCMS report notes that UK cities have already lost access to a major source of funding from the EU as they are no longer eligible to compete for European Capital of Culture. The Arts Council's report found respondents had received EU funding over the last three years ranging from €5,000 to €2.4 million, with nearly 10% of respondents having received Creative Europe funding and over 6% acting as a lead partner in European activity. There is particular concern among smaller organisations that are particularly reliant on EU funding.
  - Creative Europe's submission to the DCMS Select Committee (2018) stated that: *"between 2014 and 2016, Creative Europe supported 283 UK cultural and creative organisations and audiovisual companies... With grants totalling €57 million, this meant the UK benefited from 11% of the entire €520 million Creative Europe budget allocated in this period."*

- **Trade:**
  - The Arts Council report reiterates points made earlier in this section, that culture and creativity are central to our image around the world, and an instrument of our soft power. The CIF report sees them as vital in promoting the strengths and values of the UK internationally and as facilitators of wider trade. Trade within the EU currently provides vital income to large parts of the creative industries and arts and cultural sector. The CIF report calls for opening up access to wider markets as a matter of priority. The Arts Council report highlights that although a significant amount of NPO activity takes place in EU countries, the biggest export destination for them is the USA, with Australia and Canada also in the top 10.

- **Legal and regulatory frameworks:**
  - All three sources of evidence cited in this section also highlight how the sectors benefit from EU laws and regulations relating to copyright, digital content, media regulation, intellectual property, artist re-sale rights, VAT exemption as well as employment legislation.

3. Engagement in arts and culture

This section primarily draws upon the most recent data from Taking Part Survey 2016/17, with extra data from the DCMS *Taking Part focus on: Arts* report (Department for Digital, Culture, Media and Sport, 2018a) and a literature review conducted internally by Arts Council England in 2017. Analysis from other sources has been added where necessary.

3.1. Audiences engaging and participating in arts, museums and libraries

- All data for this section are from the most recent Taking Part Survey (Department for Digital, Culture, Media and Sport, 2018b, forthcoming), except where otherwise stated.
- 'Engagement' is defined as
    - Arts: having participated in or attended at least one activity or event pertaining to each specific artform (detailed below);
    - Museums and galleries: having either attended museum and gallery exhibitions and events in person, or visited a museum and gallery website, or both;
    - Libraries: having attended public library services and events in person, or visited websites and used digital services of libraries, or both.
- The arts activities and events included by Taking Part are:

	Activities	Events
Combined Arts	Taken part in a carnival – for example as a musician, dancer or costume maker Taken part in street arts – an artistic performance that takes place in everyday surroundings Learned or practised circus skills	Street arts – art in everyday surroundings like parks, streets or shopping centres Circus – not animals Carnival Culturally specific festival – such as Mela, Baisakhi or Navratri
Dance	Ballet Other dance (not for fitness)	Performance of Ballet, African people's or South Asian and Chinese dance, Contemporary dance or Other live dance
Literature	Written any stories, plays or poetry Been a member of a book club	Events connected with books or writing
Music	Sang to an audience or rehearsed for a performance (not karaoke) Played a musical instrument to an audience or rehearsed for a performance Played a musical instrument for own pleasure Written music	Opera or operetta Classical music performance Jazz performance Other live music event
Theatre	Rehearsed or performed in a play or drama, or an opera, operetta or musical theatre production	Performance of a play or drama, pantomime, musical theatre

Visual Arts	Painting, drawing, printmaking or sculpture Photography as an artistic activity (not family or holiday) Making films or videos as an artistic activity (not family or holiday) Using a computer to create original artworks or animation Textile crafts such as embroidery, crocheting or knitting Wood crafts such as wood turning, carving or furniture making Other crafts such as calligraphy, pottery or jewellery making	Exhibition or collection of art, photography or sculpture Craft exhibition (not crafts market) Event which included video or electronic art A public art display or installation – an art work such as sculpture that is outdoors or in a public place

3.1.1. Headlines for engagement and participation

Arts

- Audience engagement has remained largely consistent since 2010/11 across all artforms, with 77% of adults engaging with the arts in the past 12 months (Department for Digital, Culture, Media and Sport, 2018a).
- The proportion of adults engaging with the arts was higher among the following groups:
  - women;
  - white adults;
  - people aged 16 to 74;
  - people in the upper socio-economic group; and
  - people without a long-standing illness or disability.
- Nearly half of adults had engaged with the visual arts in the past 12 months, with just over four in ten engaging with music. By contrast, approximately one in ten engaged with literary events or creation.
- Yet literature saw the most statistically significant change in engagement, with a 2.4 percentage point (pp) increase overall (from 10.0% to 12.4%, equating to a 24% rise), and increases visible across almost all audience groups and subsections.
  - The only instance of lower audience engagement with literature in 2016/17 was a 0.4 pp decrease among non-white people (from 11.0% to 10.6%).
- However, the Taking Part survey does not include any questions around reading, which remains, for most people, the primary means of engaging with literature. It is therefore important to recognise that Taking Part's description of an uptick in literature activity offers only a partial picture of the literature sector, and does not reflect the Arts Council's own research, (Arts Council England, 2017), which clearly demonstrated a decline in readerships of fiction in general and literary fiction in particular over the past decade.

- Fluctuation in attendance was not statistically significant between 2010/11 and 2016/17 – aside from a 0.8 pp (21%) growth in attendance at literary events, from 3.8% to 4.6% – but there was, however, a marked change in levels of participation:
    - Literature increased by 2 pp (7.5% to 9.5%, a gain of 27.6%)
    - Visual arts increased by 2.1 pp (33.5% to 35.6%, a gain of 6.3%)
    - Dance decreased by 1.4 pp (8.1% to 6.7%, a loss of 17.3%).
- Since 2010/11, the proportion of different types of engagement has remained broadly constant across artforms, with statistically significant fluctuations including:
    - 1.6 pp (25.8%) increase in adults only participating in literature
    - 2.0 pp (10.5%) increase in adults only participating in visual arts
    - 1.6 pp (26.7%) decrease in adults only participating in dance

Figure 24: Engagement with arts over the past 12 months, 2010/11 and 2016/17

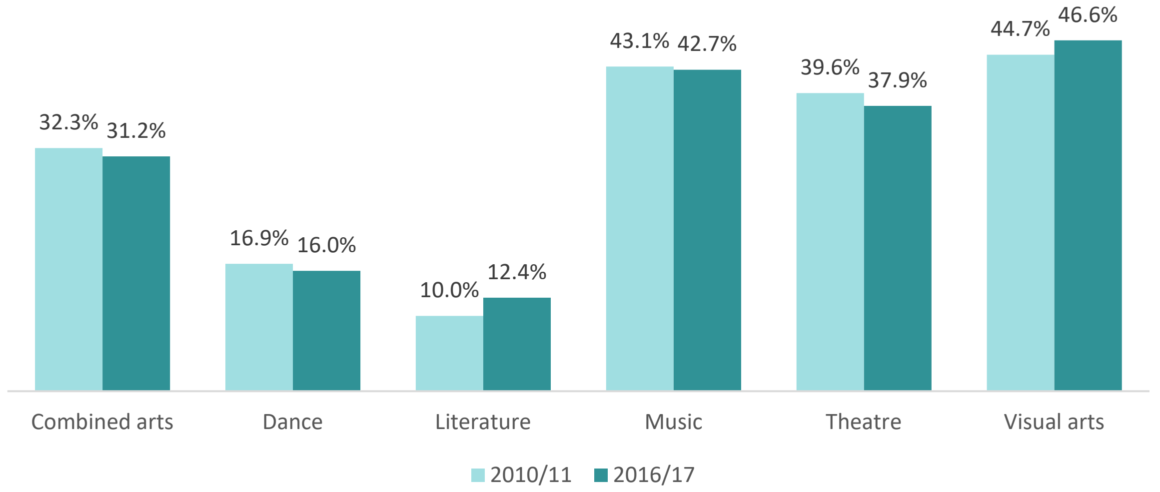


Figure 25: Attendance at arts events in the past 12 months

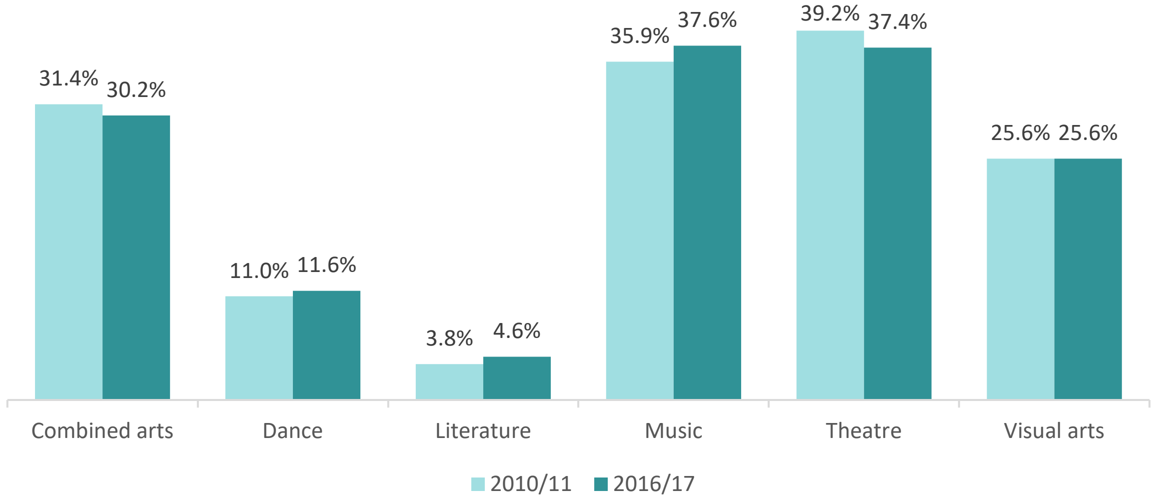


Figure 26: Participation in arts activities over the past 12 months, 2010/11 and 2016/17

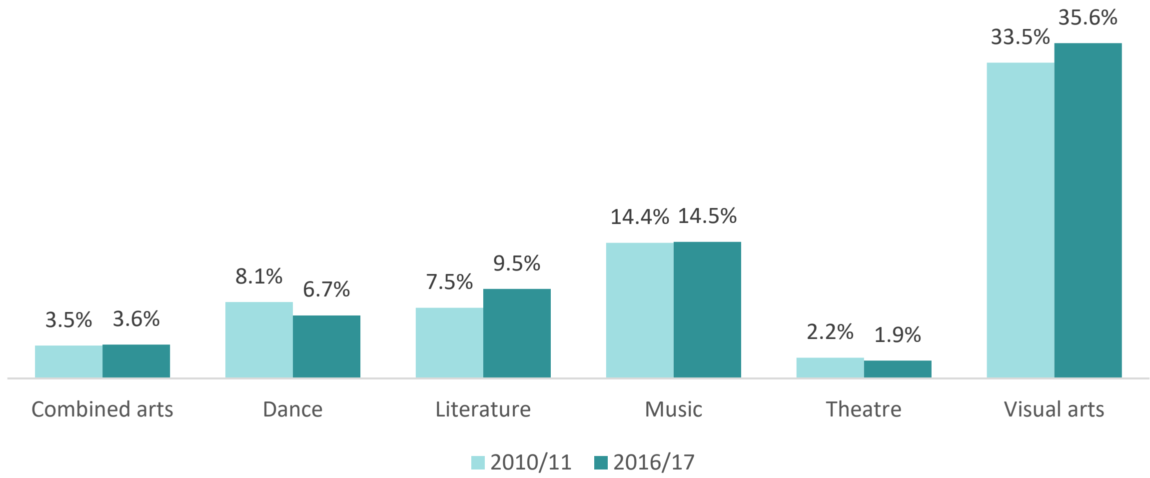
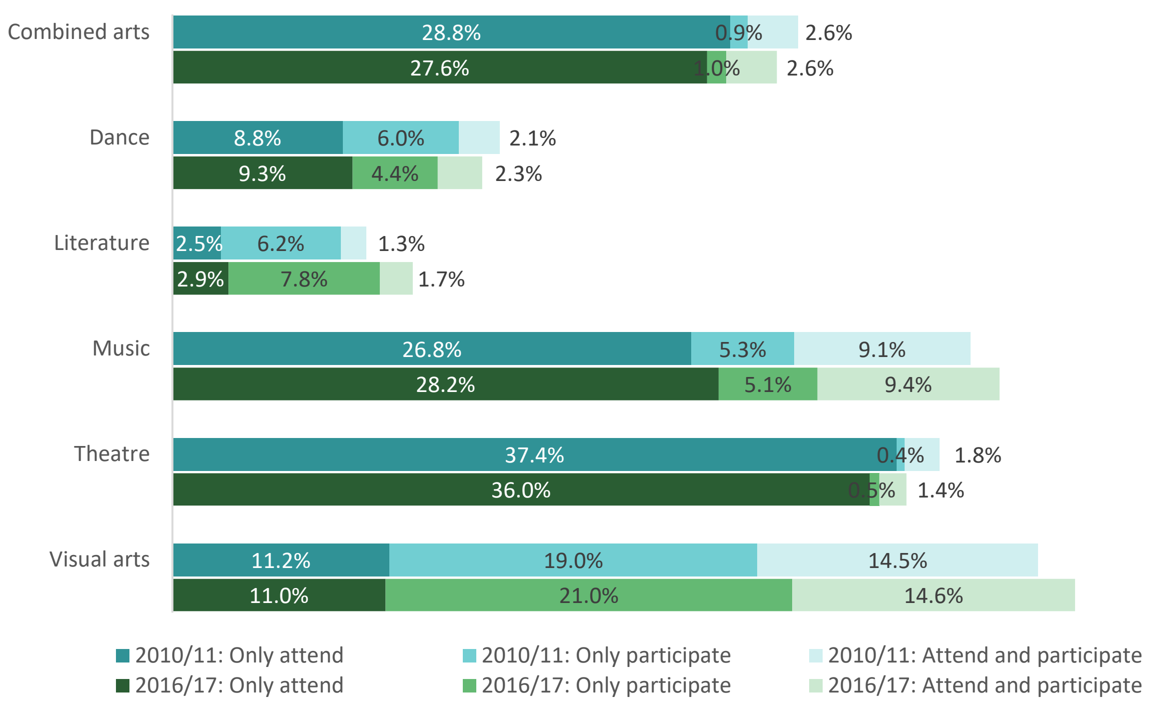


Figure 27: Types of engagement across artforms, 2010/11 and 2016/17



Museums and galleries

- Overall, half of adults in England (52.3%) had engaged with a museum or gallery in the past 12 months – a significant increase since 2010/11 (6.0 pp, from 46.3%).
- This engagement increased across all demographics.
- Roughly similar proportions of engagement in 2016/17 were place-based (i.e. visiting in person) and digital *and* place-based (i.e. visiting a museum or gallery's website) – 27.7% and 24.7%, respectively.

Figure 28: Trends in engagement with museums and galleries over the past 12 months, 2010/11 to 2016/17

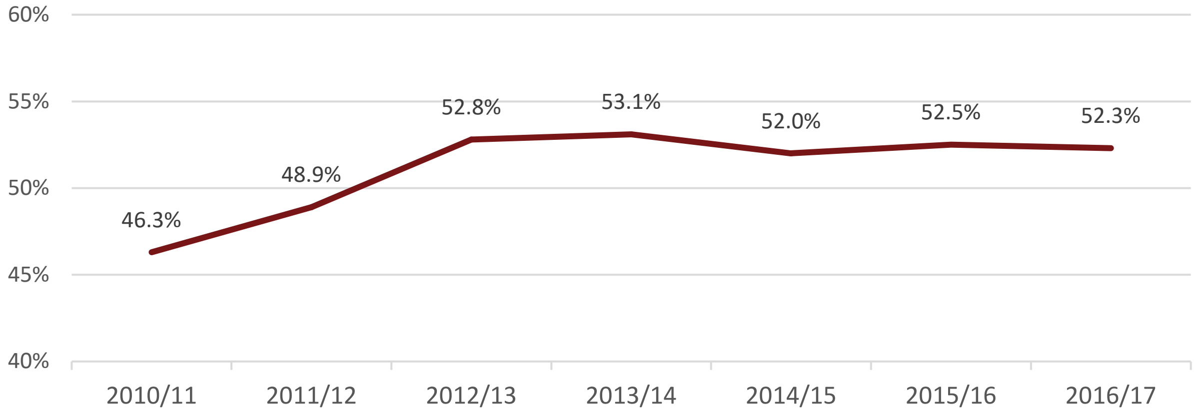
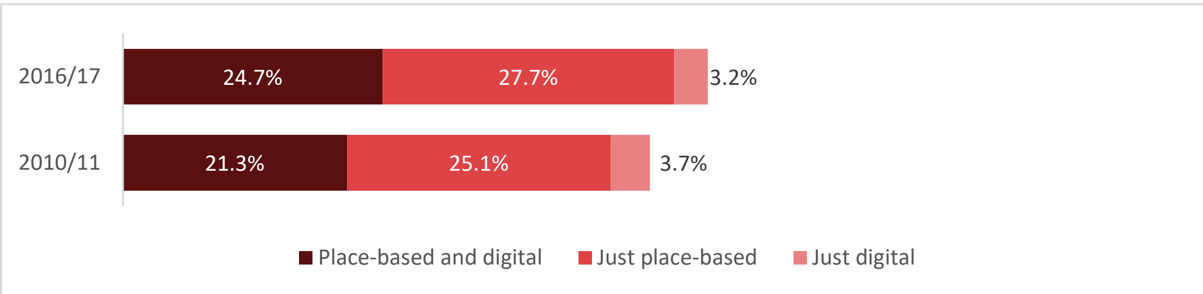


Figure 29: Types of engagement with museums and galleries, 2010/11 and 2016/17



Libraries

- Approximately one in three adults (34.0%) used a public library service in 2016/17 – a significant decrease since 2010/11 (5.7 pp, from 39.7%).
- This decrease was observable across all demographics.
- Digital engagement with libraries was proportionally low, with 9.9% adults engaging in person and digitally, and 2.9% just digitally.

Figure 30: Trends in engagement with libraries over the past 12 months, 2010/11 to 2016/17

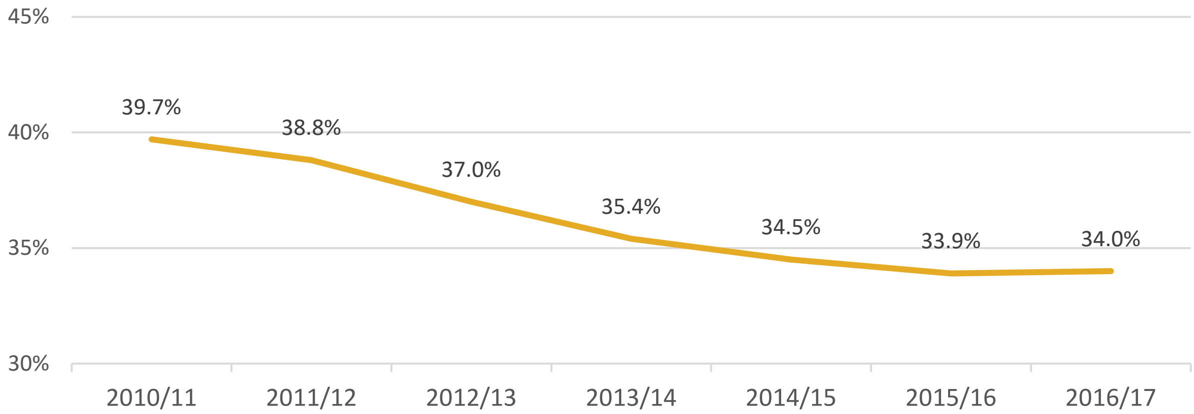
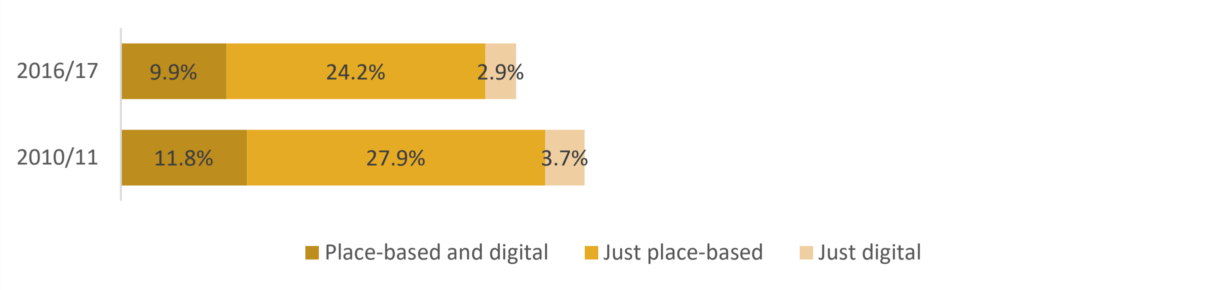


Figure 31: Types of engagement with libraries, 2010/11 and 2016/17



Overall findings

- Engagement with library services showed considerably different trends to other areas of arts and culture.
- By and large, however, the likelihood of an adult engaging with arts, museums and galleries, or libraries was affected by at least two of the following five factors:
  - **Socio-economic group**: the most consistent inequality of engagement can be seen between higher and lower socio-economic groups, with those at the higher end engaging more with arts and culture across the board;
  - **Gender**: women tend to engage with arts and culture more than men;
  - **Ethnicity**: non-white audiences are significantly less likely to engage in all artforms except dance, though far more likely to use library services;
  - **Age**: adults aged 75 and over consistently engage least with arts (except literature), and similarly with museums and galleries; and
  - **Disability:** adults with a longstanding disability or illness are less likely to engage with arts and culture than those without – except with regard to libraries.
- These individual demographics are analysed in more detail below.

3.1.2. Socio-economic group

- Socio-economic group showed the most consistent inequality across all audiences, showing far less engagement with arts, museums and galleries, and libraries among lower socio-economic groups than higher.

Arts

- Across artforms, the average engagement among the lower socio-economic group was a little under 2/3 the size of the higher (22.5% as compared to 36.9%). There was, however, a 1.3 pp increase in average lower group engagement since 2010/11.
- As with other audiences, there was a rise in engagement with literature among both higher and lower socio-economic groups.
  - Higher – 2.8 pp increase, from 12.2% to 15.0%
  - Lower – 1.8 pp increase, from 5.9% to 7.7%
- This means that, although engagement among the lower socio-economic group showed a statistically significant increase, the difference between the two groups nevertheless also grew by 1 pp.

- There was also a significant increase in engagement with music among the lower socio-economic group, rising 3.1 pp from 27.5% to 30.6%.
- The largest change in engagement across both socio-economic groups and all artforms, however, was the increase among the lower group in visual arts (rising 4.5 pp, from 32.3% in 2010/11 to 36.8% in 2016/17).

Figure 32: Engagement across artforms by socio-economic group, 2010/11 and 2016/17

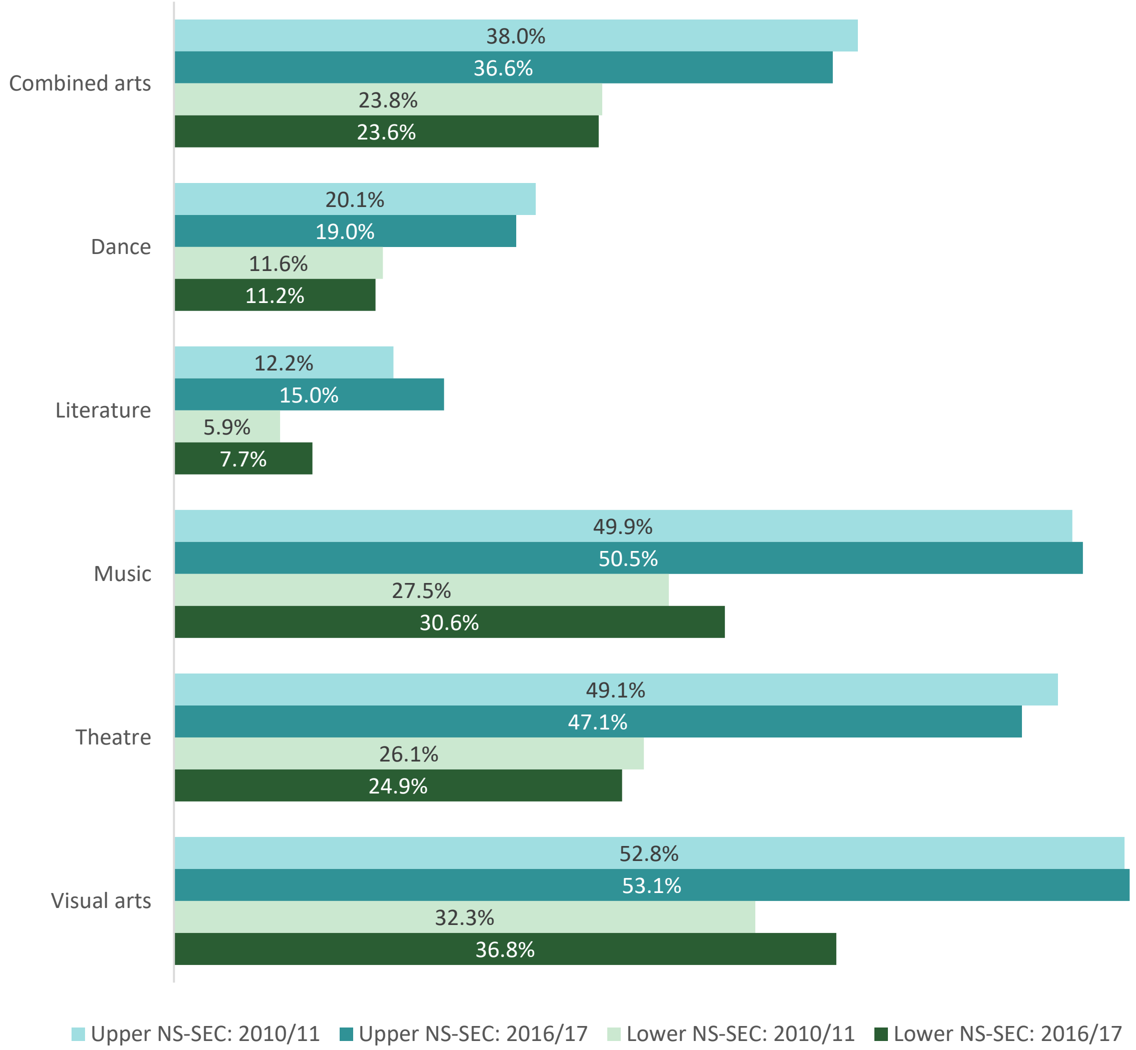
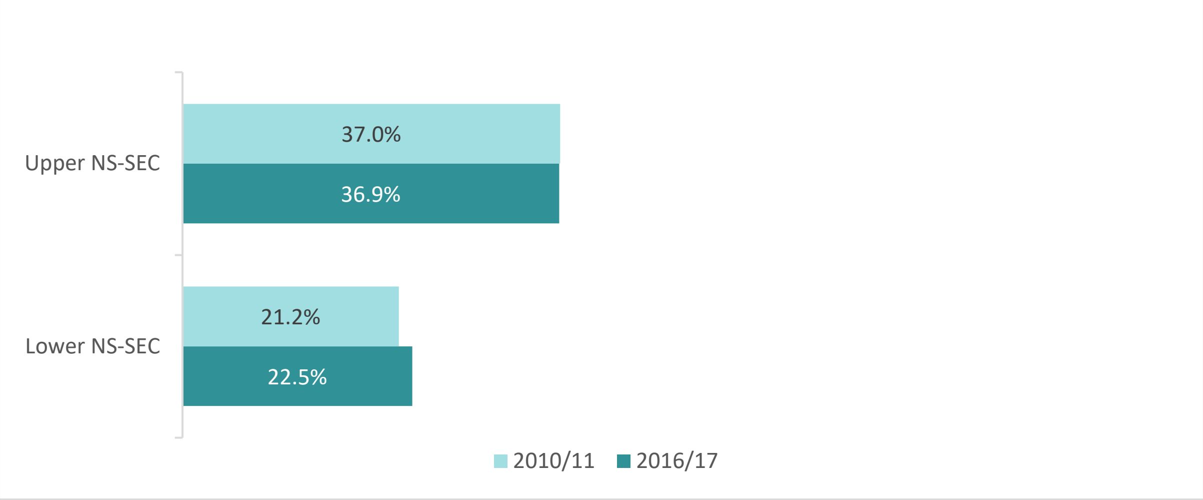


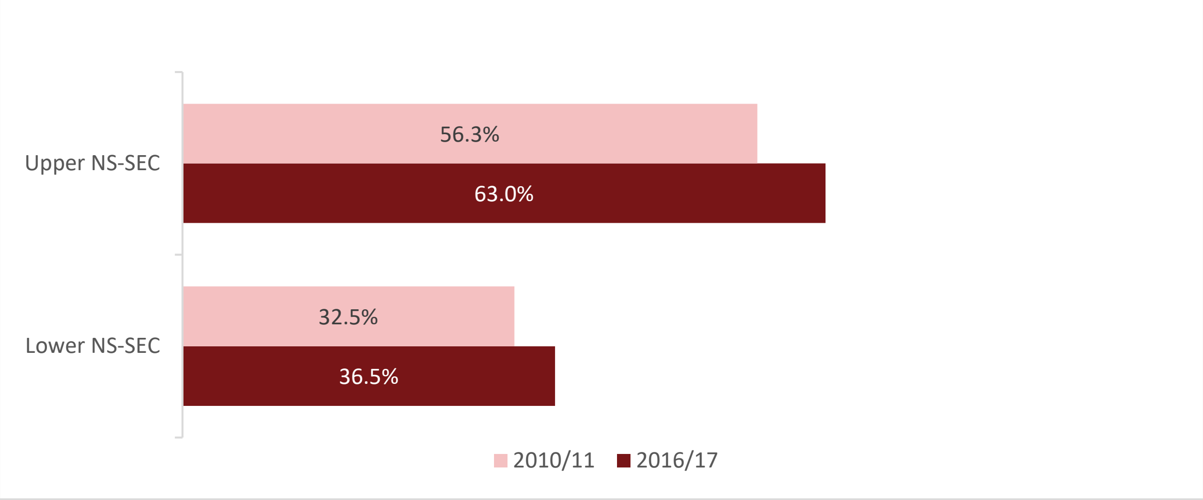
Figure 33: Average artform engagement by socio-economic group, 2010/11 and 2016/17 [4]



Museums and galleries

- Engagement was significantly higher in 2016/17 than 2010/11 across both upper and lower socio-economic groups, with 6.7 pp and 4.0 pp rises respectively.
- However, this meant there was a corresponding increase in the disparity between engagement of each group, with adults in the upper socio-economic group now even more likely to engage with museums and galleries than those in the lower (63.0% compared to 36.5%, respectively – a gap of 26.5 pp).

Figure 33: Engagement with museums and galleries by socio-economic group, 2010/11 and 2016/17



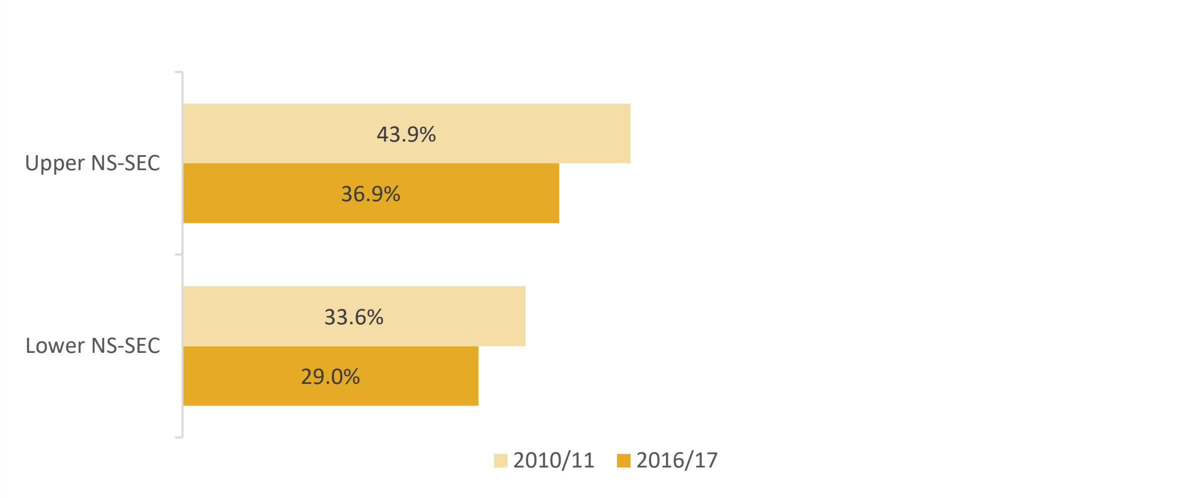
Libraries

- Engagement was significantly lower in 2016/17 than 2010/11 across both upper and lower socio-economic groups, with 7.0 pp and 4.6 pp decreases respectively.

[4] Calculated as mean of artforms engagement in each group.

- Despite the proportion of adults engaging with libraries decreasing less among those in the lower socio-economic group than the upper (4.6 pp as compared to 7.0 pp), there was nevertheless a clear disparity of engagement between these groups in both years. The gap between groups did decrease between 2010/11 and 2016/17, however, falling from a difference of 10.3 pp to 7.9 pp respectively.

Figure 34: Engagement with libraries by socio-economic group, 2010/11 and 2016/17



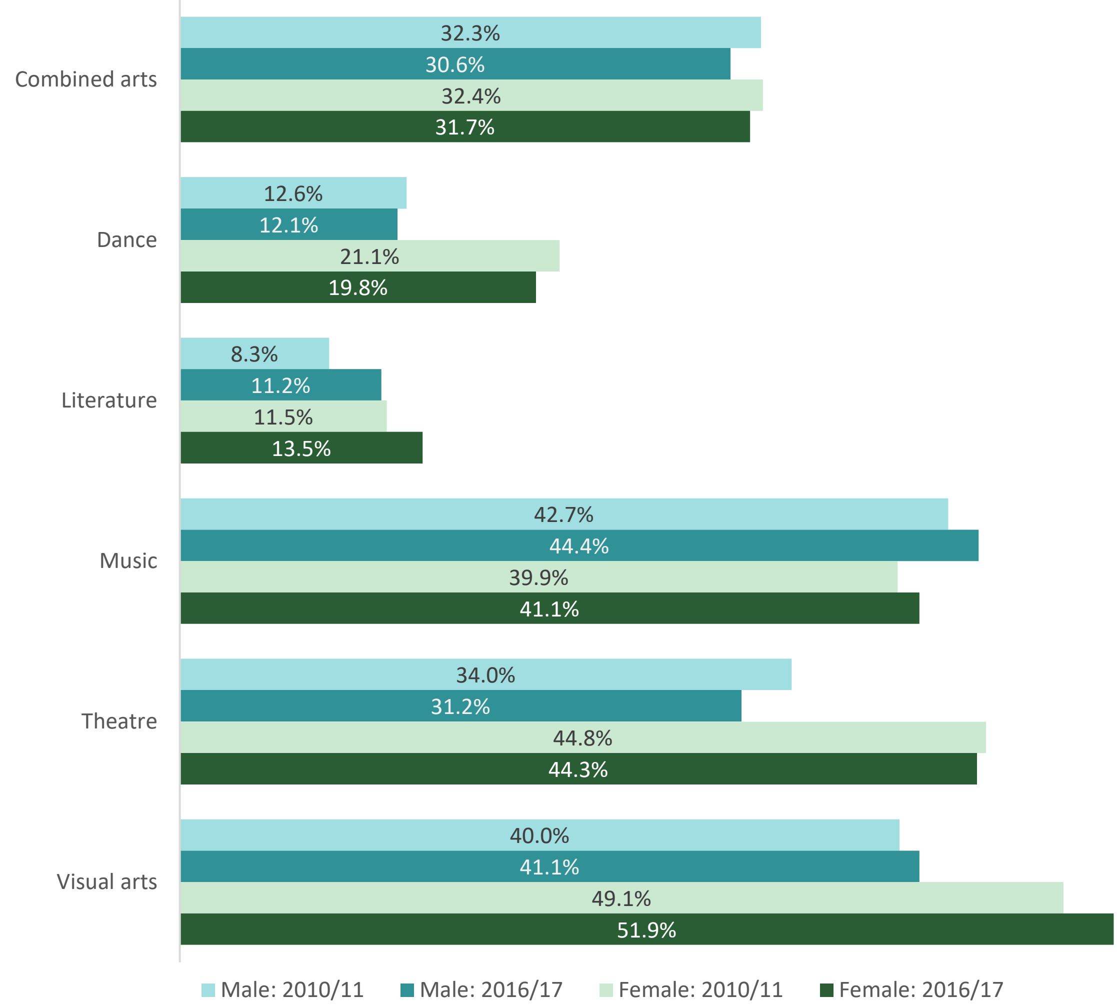
3.1.3. Gender

- In general, engagement with arts and culture was higher among females than males.
- However, proportions were consistently similar for combined arts and museums and galleries, while male engagement was higher for music.

Arts

- Audiences in 2016/17 were almost always majority female, with the exception of music (which showed 3.3 pp higher engagement among males).
- There were large differences between gender engagement seen in several artforms:
  - For dance, there were 7.7 pp more female audience members than male (19.8% compared to 12.1%)
  - For theatre, 13.1 pp more females (44.3% to 31.2%)
  - For visual arts, 10.8 pp more females (51.9% to 41.1%).

Figure 35: Engagement across artforms by gender, 2010/11 and 2016/17

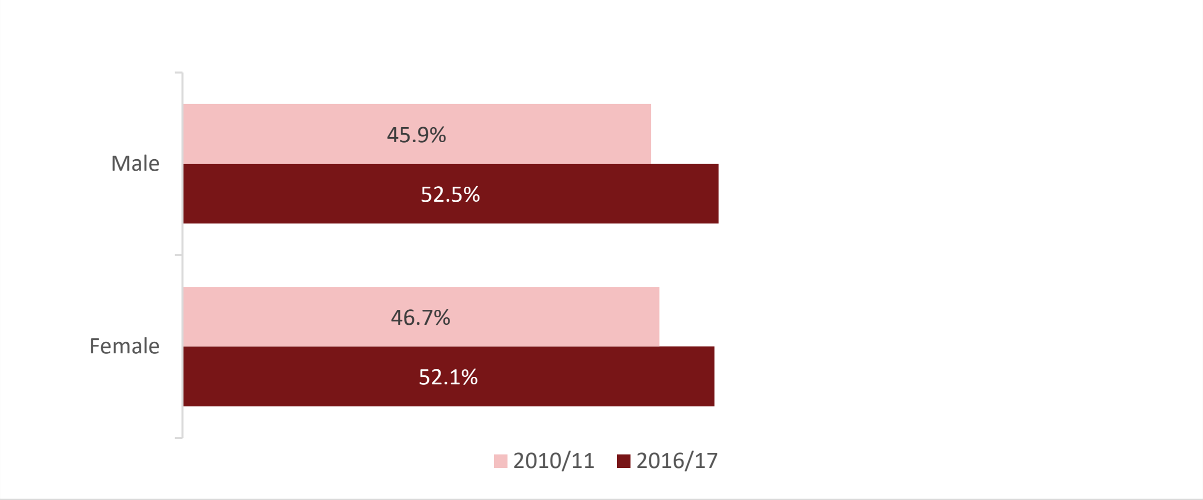


- When it came to gender, the most significant fluctuations over the period were in male engagement with theatre (34.0% down to 31.2%) and female engagement with visual arts (49.1% up to 51.9%).
- Literature also saw a significant increase in engagement for both genders, consistent with an overall increase across almost all demographics.

Museums and galleries

- Engagement was significantly higher in 2016/17 than 2010/11 among both males and females, with 6.6 pp and 5.4 pp rises respectively.
- Gender has far less of an impact on likelihood of adults to engage with museums and galleries than other areas of arts and culture, with a gap between the two groups of only 0.4 pp (down from 0.8 pp in 2010/11). Within this small difference, males are – unusually – slightly more likely to engage than females.

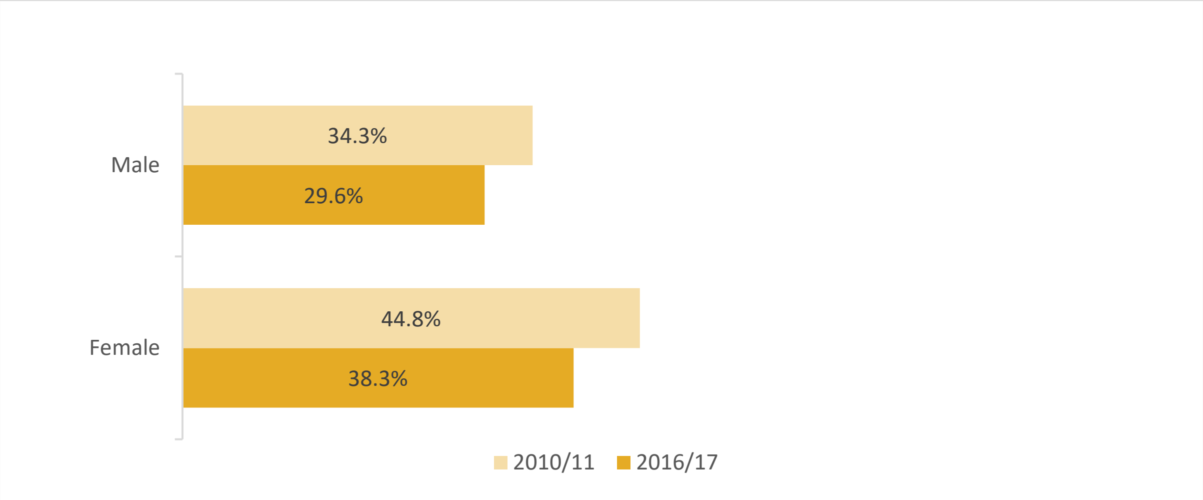
Figure 36: Engagement with museums and galleries by gender, 2010/11 and 2016/17



Libraries

- There was a statistically significant decrease in the proportion of males and females who used libraries between 2010/11 and 2016/17, falling by 4.7 pp and 6.5 pp respectively.
- Females consistently used library services more than males, with an 8.7 pp difference of engagement in 2016/17 (down from 10.5 pp in 2010/11).

Figure 37: Engagement with libraries by gender, 2010/11 and 2016/17



3.1.4. Ethnicity

Arts

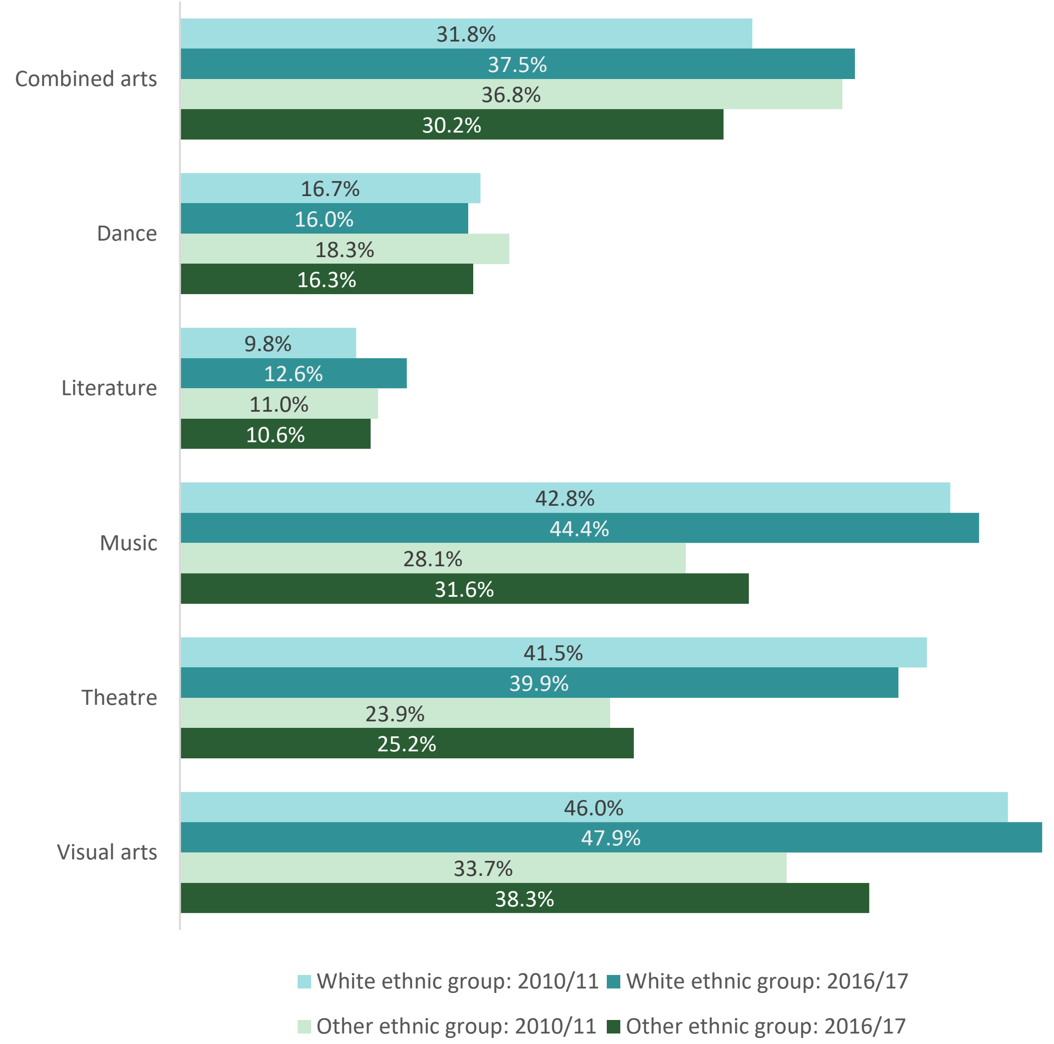
- Ethnicity is a significant factor of engagement across most artforms, with white audiences almost always engaging in higher levels.
- The largest change to engagement in real terms was the increase in white audiences engaging with combined arts and the concurrent decrease in other ethnic groups

engaging with combined arts (5.7 pp increase in white audiences, 6.6 pp decrease in other ethnic groups) since 2010-11.

  - Levels of engagement in combined arts have switched between audiences, with white ethnic groups now comprising the majority:
  - 2010/11 – 31.8% white, 36.8% other, as opposed to
  - 2016/17 – 37.5% white, 30.2% other

- There has also been a 2 pp decrease in engagement with dance among other ethnic groups, and a statistically significant drop in attendance at African people's dance or South Asian and Chinese dance events (from 2.3% in 2010/11 to 1.7% in 2016/17).
- The largest increase in engagement for other ethnic groups was seen in visual arts, rising by 4.6pp from 33.7% in 2010/11 to 38.3% in 2016/17.
- White audiences increased significantly for engagement with literature, growing from 9.8% to 12.6% – inverting the proportion of 2010/11 and showing a greater difference between the two groups.
- The difference between levels of engagement remained highest for theatre in 2016/17 at 14.7 pp, though this is 2.9 pp lower than in 2010/11 (a 17.6 pp difference). The most evenly spread engagement was for dance, with a difference of 0.3 pp.

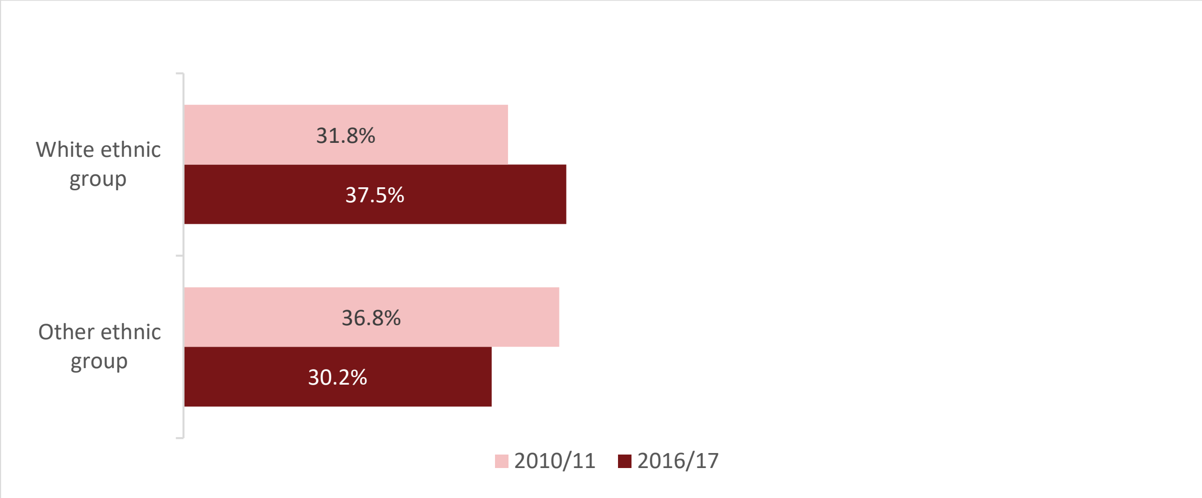
Figure 38: Engagement across artforms by ethnicity, 20/11 and 2016/17



Museums and galleries

- Engagement was significantly higher in 2016/17 than 2010/11 among the white ethnic group, with a 5.7 pp increase to 37.5%.
- However, there was a large decrease in engagement among other ethnic groups, dropping 6.6 pp to 30.2% over the same period.
- This means that, from 2010/11 to 2016/17, there was an inversion of engagement levels between the groups, with 7.3 pp higher engagement among white adults in 2016/17 as compared to 5.0 pp higher among other ethnic groups in 2010/11.

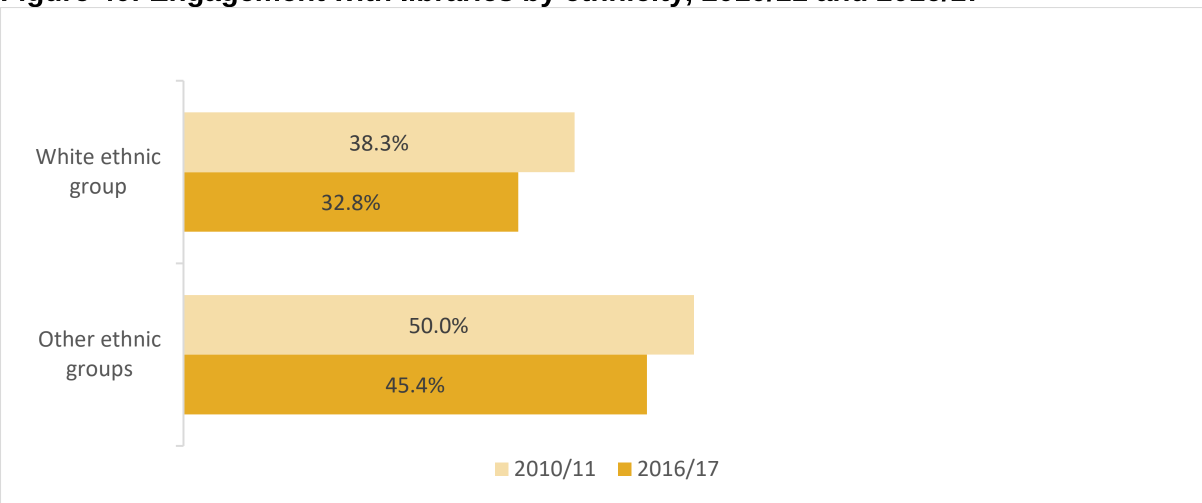
Figure 39: Engagement with museums and galleries by ethnicity, 2010/11 and 2016/17



Libraries

- There was a statistically significant decrease in engagement with libraries among the white ethnic group, falling 5.5 pp between 2010/11 and 2016/17. Engagement among other ethnic groups, however, remained at a similar level.
- This contributed to a widening of the gap between engagement levels of both groups, with the difference increasing from 11.7 pp to 12.6 pp.
- A higher proportion of adults from other ethnic groups engaged with libraries than with any other category surveyed.

Figure 40: Engagement with libraries by ethnicity, 2010/11 and 2016/17



3.1.5. Age

Arts

- Age consistently proved to be a significant factor, with little change since 2010/11.
- Engagement among the 75+ group was lower than all others in every artform, both in 2010/11 and 2016/17.

- This gap was least pronounced in literature (1.9 pp less than 65-74, the highest engagement age group), which saw both the most uniform levels of engagement and the most uniform growth trend across age-groups.
- The largest gap between age-groups was found in music, where 50.3% of 16-24 year-olds engaged as compared with 27.9% of the 75+ group. It is worth noting, however, that this oldest group saw the most significant change since 2010/11, growing 5.2pp from 22.7% over the 6yr period.
- A further notable difference to engagement in 2010/11 is the 65-74 group in visual arts, which increased by 3.9pp from 47.8% to 51.7%.
- This 65-74 group had consistently the highest level of engagement between 2010/11 and 2016/17 in dance, theatre and visual arts.

Figure 41: Engagement across artforms by age, 2016/17

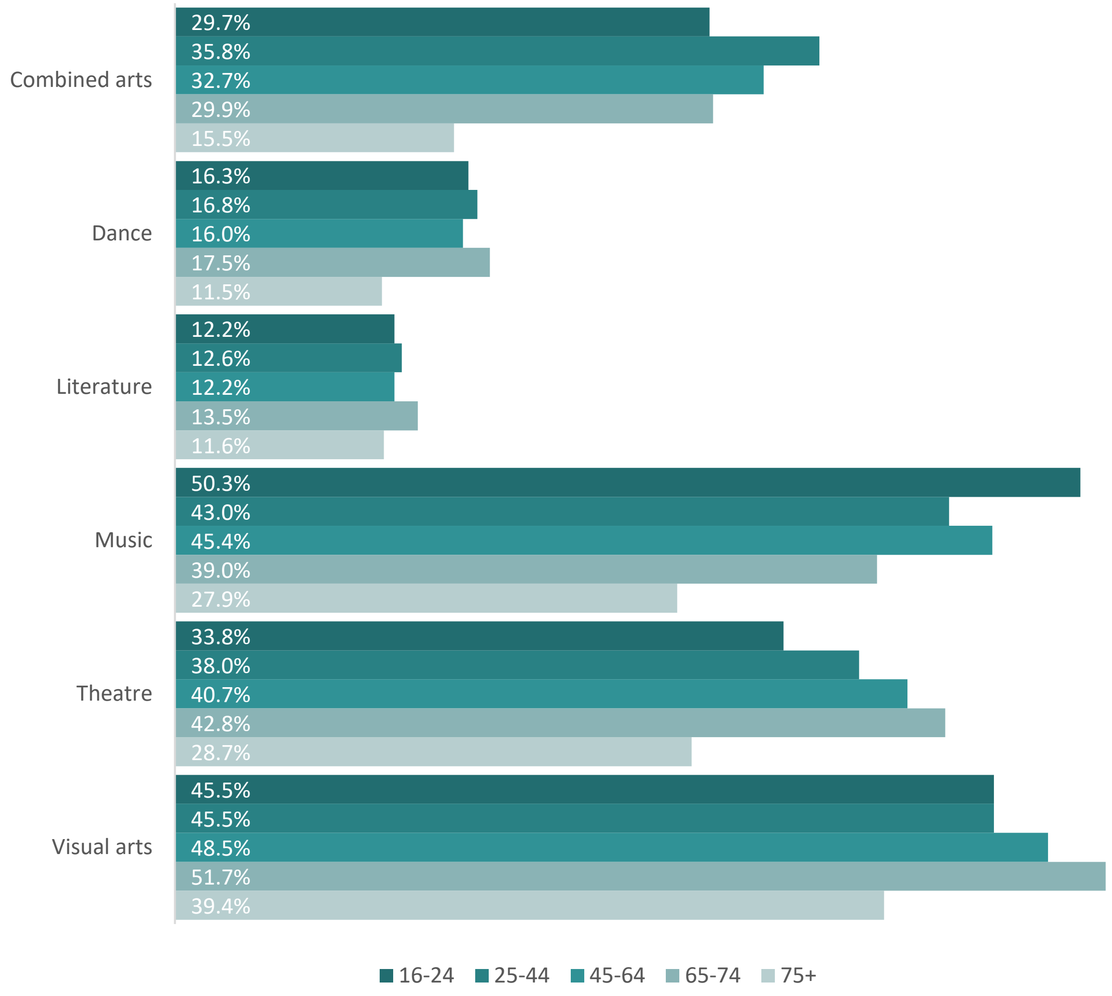


Figure 42: Comparison of engagement across artforms by age, 2010/11 and 2016/17

	Combined arts		Dance		Literature		Music		Theatre		Visual arts	
16-24	31%	30%	18%	16%	12%	12%	48%	50%	33%	34%	43%	46%

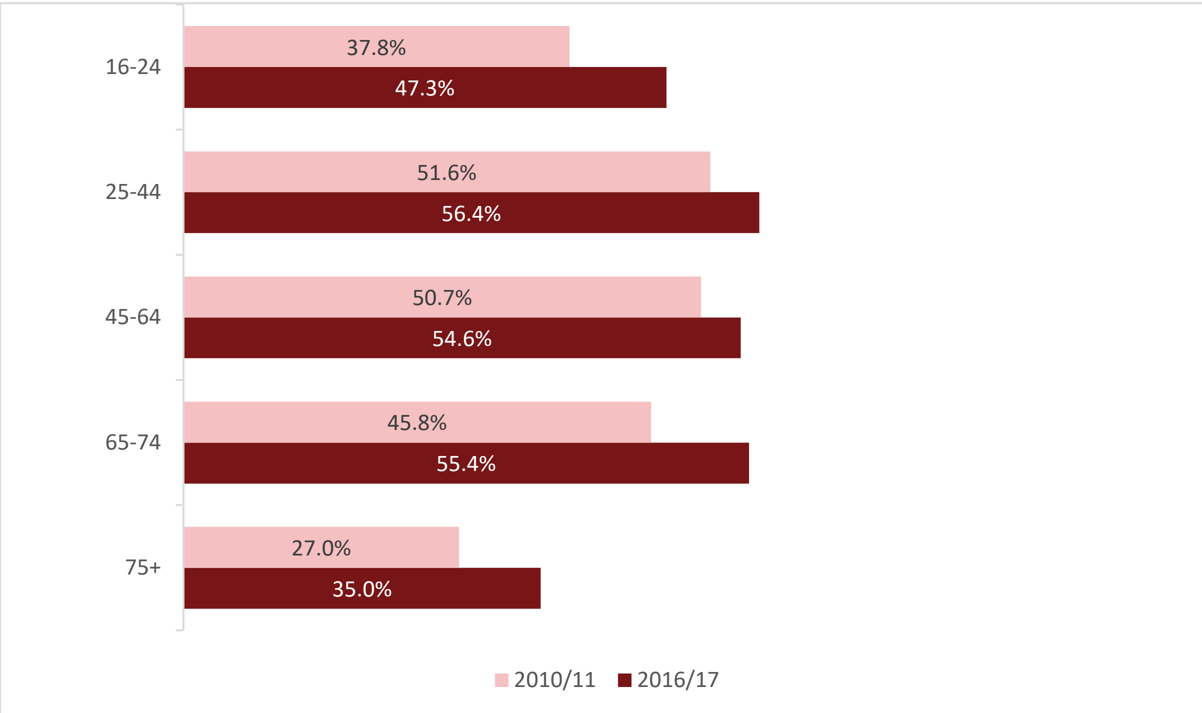
	Combined arts		Dance		Literature		Music		Theatre		Visual arts	
25-44	38%	36%	17%	17%	10%	13%	43%	43%	41%	38%	44%	46%
45-64	34%	33%	18%	16%	10%	12%	44%	45%	43%	41%	48%	49%
65-74	29%	30%	18%	18%	10%	14%	36%	39%	44%	43%	48%	52%
75+	14%	16%	11%	12%	7%	12%	23%	28%	30%	29%	36%	39%

Key: 10/11 16/17

Museums and galleries

- A statistically significant increase in engagement was seen across all age-groups between 2010/11 and 2016/17, with the largest change among 65-74 year-olds (9.6 pp) and the smallest among 45-64 year-olds.
- As seen in the arts, adults aged 75 and over had the lowest level of engagement (35.0%).
- The 25-44 group engaged most with museums and galleries in both 2010/11 (51.6%) and 2016/17 (56.4%).
- The gap between age-groups with highest and lowest engagement widened over the period, increasing from 21.4 pp to 24.6 pp – the second largest disparity among groups in all demographics.

Figure 43: Engagement with museums and galleries by age, 2010/11 and 2016/17

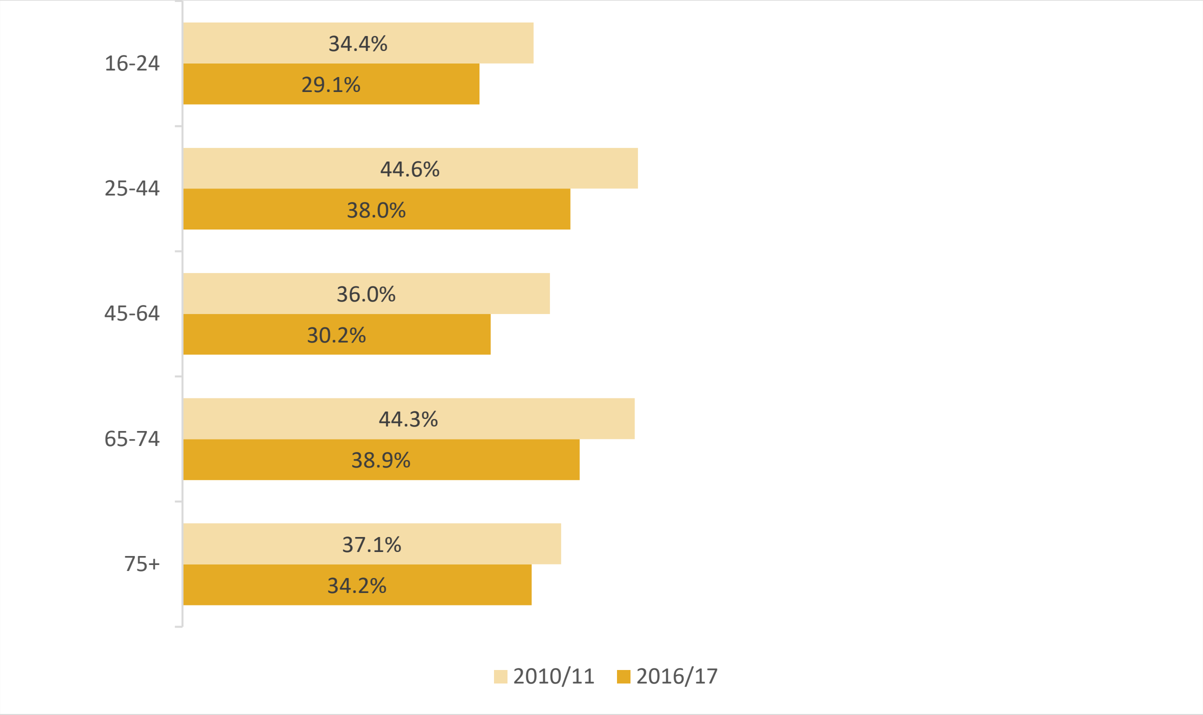


Libraries

- There was a statistically significant decrease in engagement with libraries among 25-74 year-olds:

  - The largest change was among the 25-44 group, falling 6.6 pp to 38.0%
  - The smallest change was among the 65-74 group, falling 5.4 pp to 38.9%.
- The 16-24 and 75+ groups remained stable during the period, though the 16-24 group showed the lowest level of engagement both in 2010/11 (34.4%) and 2016/17 (29.1%).

Figure 44: Engagement with libraries by age, 2010/11 and 2016/17

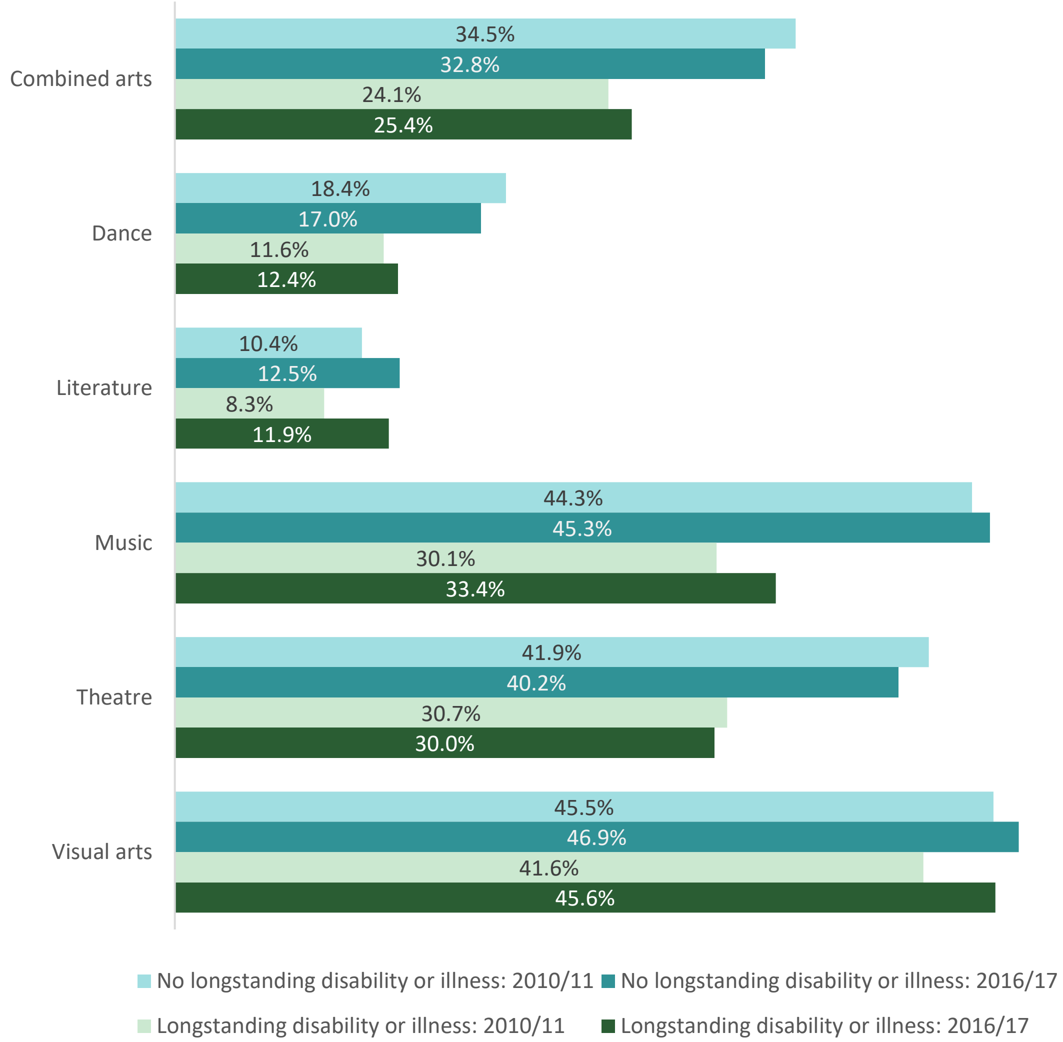


3.1.6. Disability

Arts

- While longstanding disability and illness still had an observable impact on engagement with the arts, with lower engagement across all artforms, there have been several improvements since 2010/11.
- The proportions of audiences who identified as disabled and those who did not have shifted slightly towards equality in all artforms, with the difference between groups decreasing by 1.0 - 3.0 pp between 2010/11 and 2016/17.
- The most significant increases of engagement among audiences with a longstanding disability or illness were:
  - Literature (3.6 pp, giving this the lowest difference of engagement between those with and without a longstanding disability or illness, at 0.6 pp);
  - Music (3.3 pp, though this still had the largest difference of engagement between those with and without a longstanding disability or illness, at 11.9 pp); and
  - Visual arts (4.0 pp).

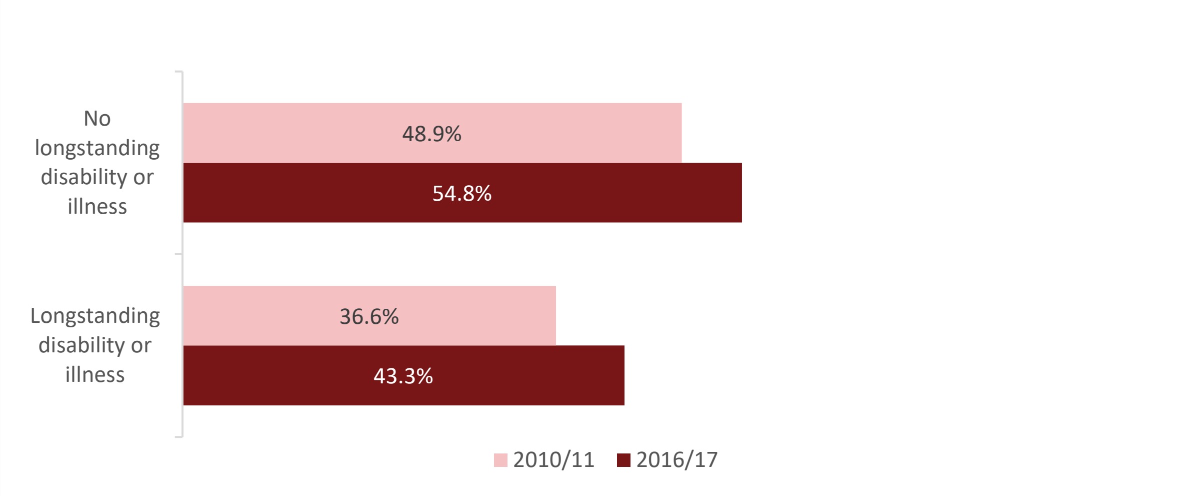
Figure 45: Engagement across artform by disability, 2010/11 and 2016/17



Museums and galleries

- There was a statistically significant increase in engagement among adults both with and without a disability or longstanding illness between 2010/11 and 2016/17 (6.7 pp and 5.9 pp, respectively).
- However, adults with a disability or longstanding illness were still considerably less likely to engage with museums and galleries than those without (43.3% versus 54.8%, respectively).
- The 2016/17 figures represent a slight closing of the gap between groups within this demographic, decreasing from a 12.3 pp to 11.5 pp difference.

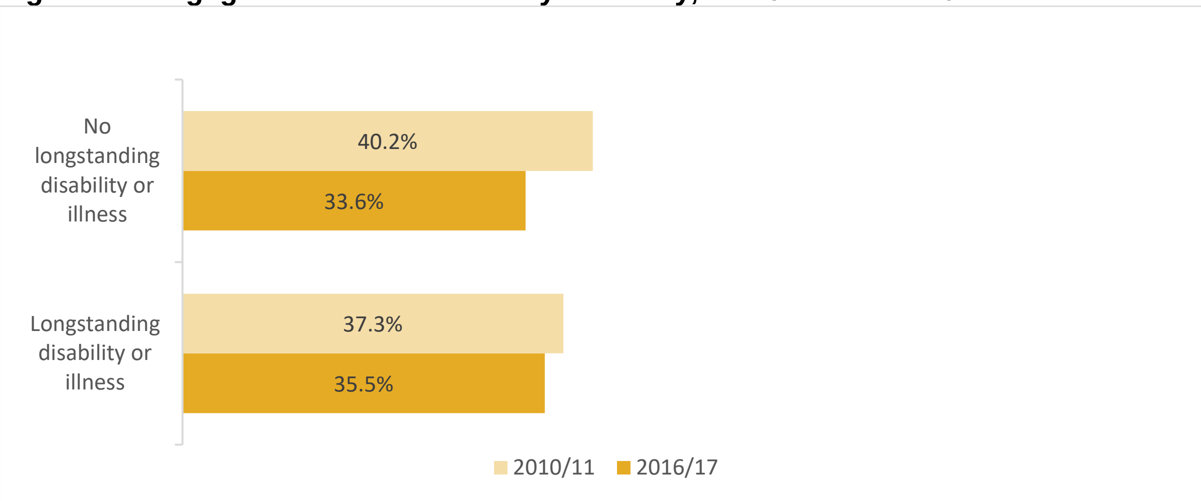
Figure 46: Engagement with museums and galleries by disability, 2010/11 and 2016/17



Libraries

- Between 2010/11 and 2016/17 there was a statistically significant decrease in engagement with libraries among adults with no longstanding disability or illness, dropping 6.6 pp to 33.6% over the period.
- Engagement among adults who identified as disabled, however, remained stable.
- The difference of engagement with libraries between the two groups was among the lowest across arts and culture in 2016/17 (1.9 pp), with only literature and visual arts showing more proportionally similar levels (0.6 pp and 1.3 pp difference, respectively).

Figure 47: Engagement with libraries by disability, 2010/11 and 2016/17



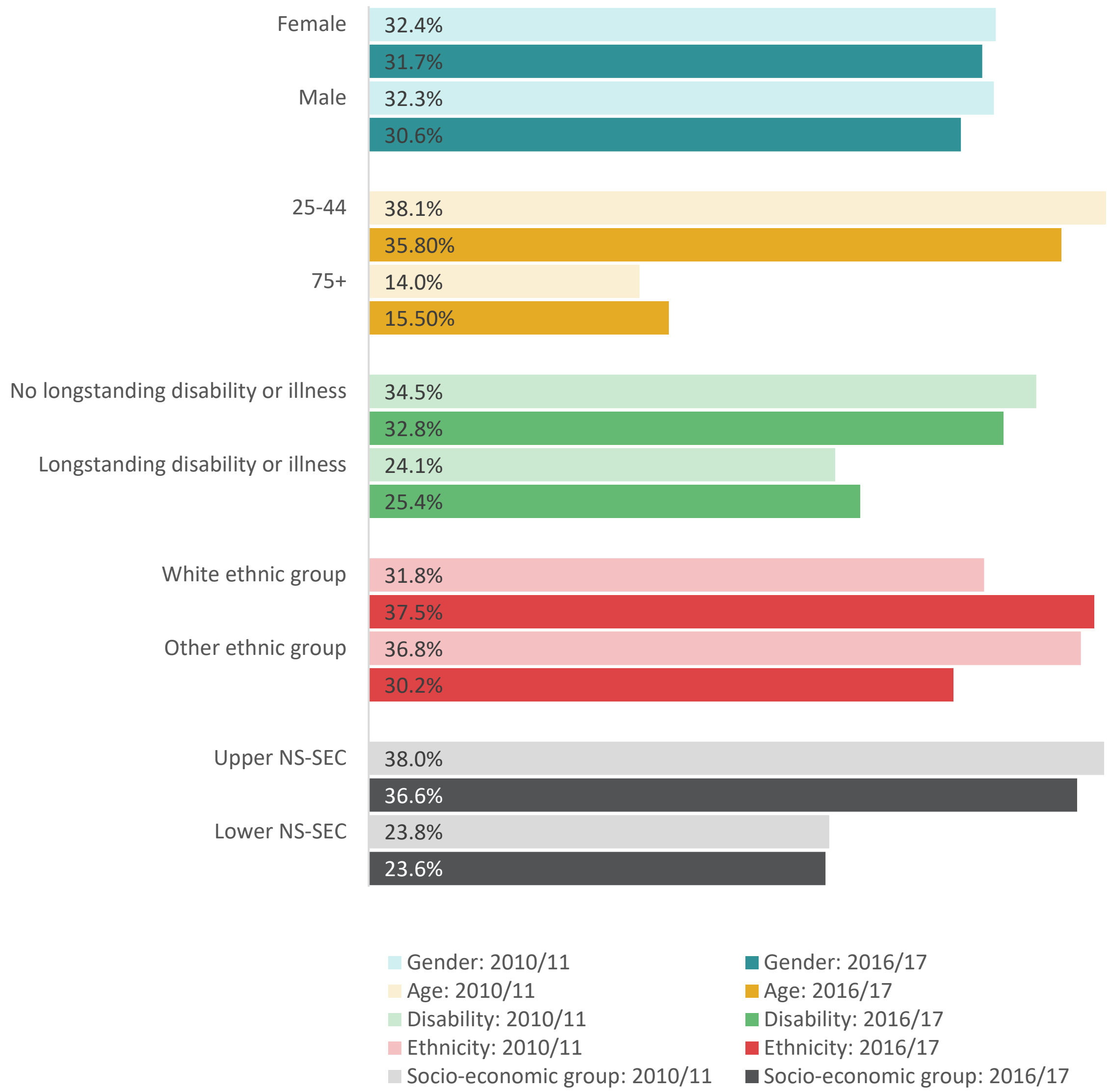
3.2. Demographic trends in audience engagement and participation with individual forms of arts and culture

3.2.1. Combined arts

- Overall engagement was 31.2% – a statistically similar level to 2010/11.

- The vast majority of those who engage with the combined arts only attend rather than participate in any way (27.6% as compared to 2.6% who attend and participate and 1.0% who only participate – equating to a proportion of 88.5% non-participatory engagement, the lowest across all artforms).
- In 2016/17, engagement was significantly affected by age, disability status, ethnicity and socio-economic group:
    - 25-44 year-olds were most represented among audiences for combined arts (35.8%) – 20.3 pp higher than the 75+ group (15.5%);
    - One in four adults who engaged with the combined arts reported a longstanding disability or illness, as opposed to 32.8% who did not;
    - 37.5% audiences were white, while 30.2% belonged to other ethnic groups – an inversion of 2010/11, which saw engagement among white groups at a lower level (31.8%) than other ethnic groups (36.8%); and
    - Audiences from upper socio-economic groups were far more likely than lower to engage with combined arts (36.6% as opposed to 23.6%).
- In the following charts, the ages compared are those with highest and lowest levels of engagement; all other audience demographics had only two groups.

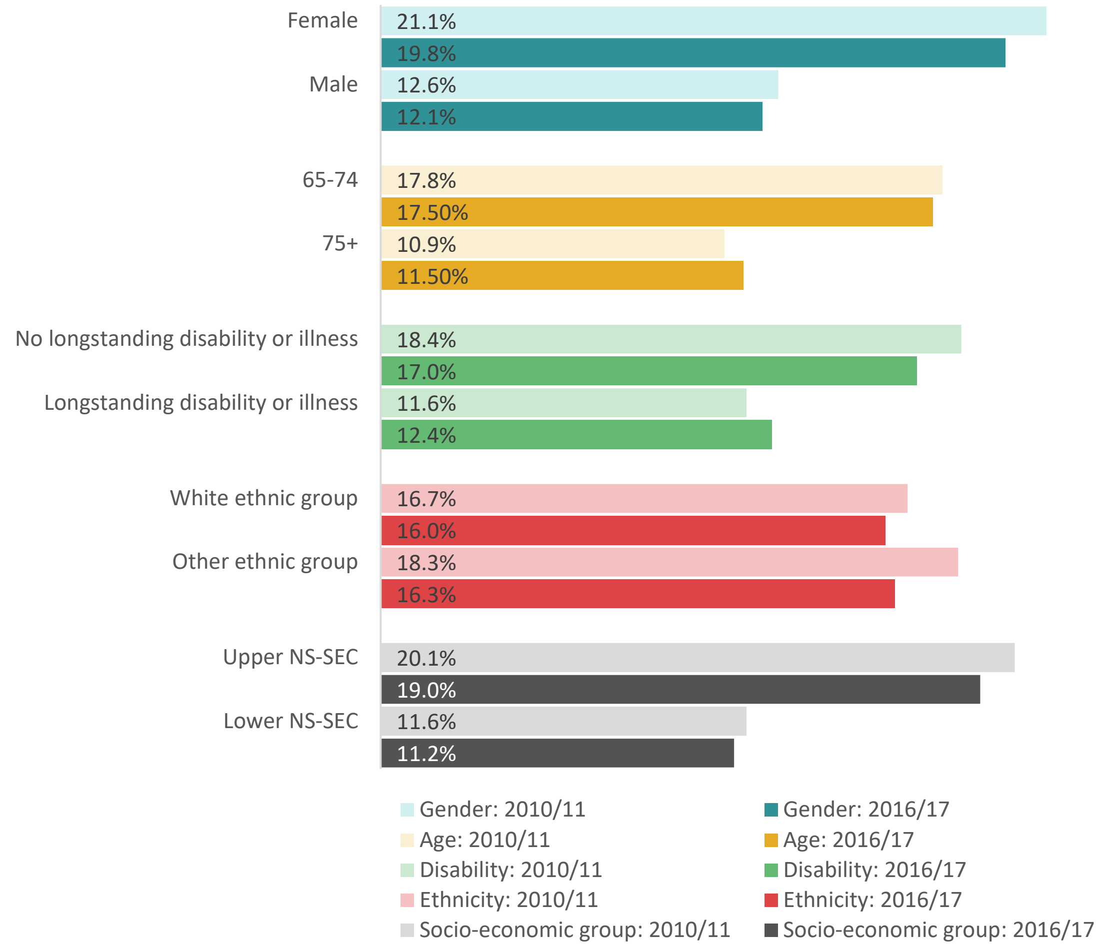
Figure 48: Comparison of engagement in combined arts by audience demographic, 2010/11 and 2016/17



3.2.2. Dance

- Overall engagement was 16.0% – a statistically similar level to 2010/11.
- There has been a significant decrease in audiences who only participate in dance, dropping from 6.0% in 2010/11 to 4.4% in 2016/17.
- In 2016/17, engagement was significantly affected by gender, age, disability status and region:
    - Audiences were more likely to be female (19.8%) than male (12.1%);
    - There was limited difference of engagement among 16-74 year-olds, with 65-74 year-olds as the most represented group among those who engaged with dance (17.5%) – the 75+ group, however, was 6 pp lower (11.5%); and
    - Audiences were less likely to have a longstanding disability or illness (12.4%) than not (17.0%)

Figure 49: Comparison of engagement in dance by audience demographic, 2010/11 and 2016/17



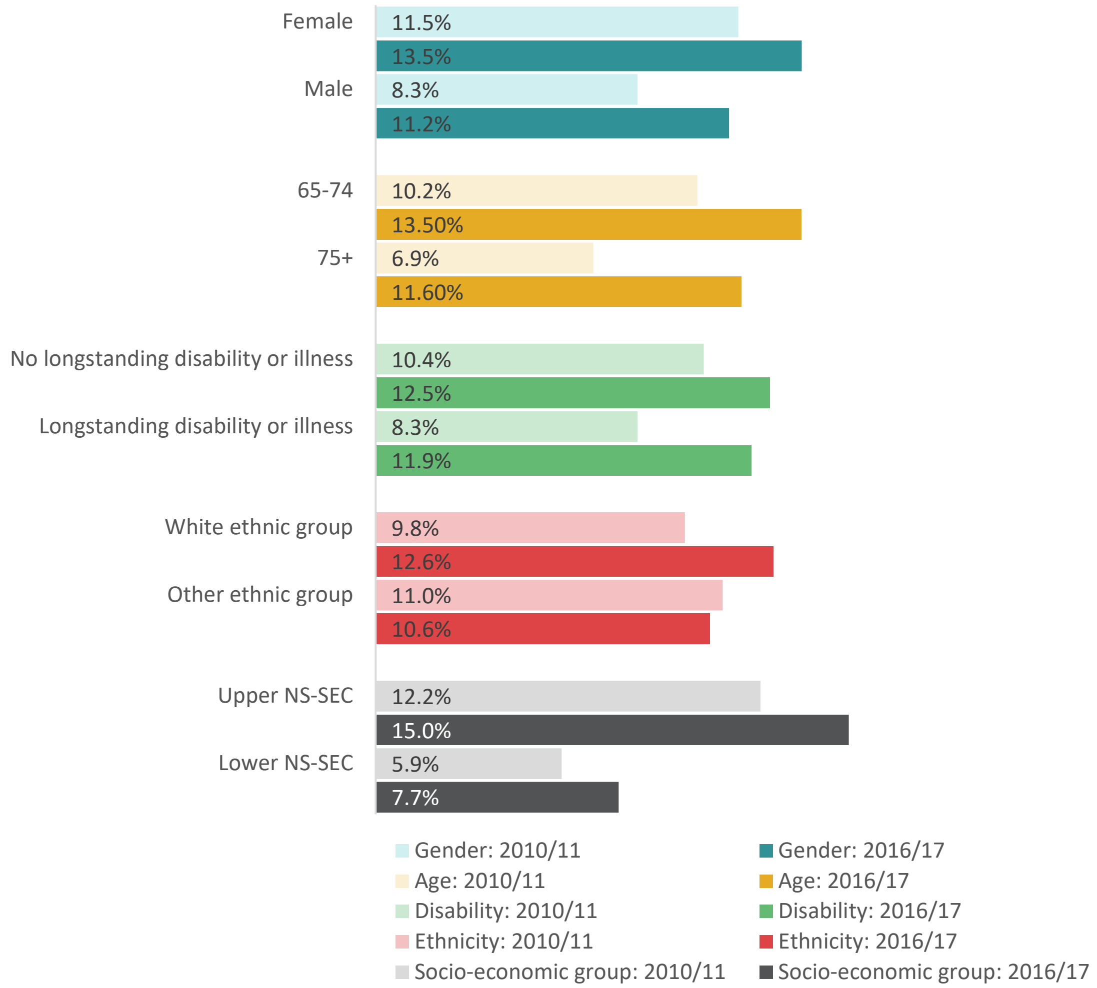
- There was a significant decrease in the proportion of adults that had attended African people's or South Asian and Chinese dance (0.6 pp, from 2.3% to 1.7%), and participated in other dance (not for fitness) (1.5 pp, from 7.8% to 6.3%).
- However, there was an increase in attendance at other live dance, rising 2.1 pp from 4.6% to 6.7%.

3.2.3. Literature

- Overall engagement was 12.4% – a statistically significant increase of 2.4 pp since 2010/11.
- This comprised significant increases in both attendance at literary events (0.8 pp, from 3.8% to 4.6%) and participation (2.0 pp, from 7.5% to 9.5%).
- Proportionally, the most significant increase was among those who only participated, rising 1.6 pp from 6.2% to 7.8%. This means that, of those who engaged, 76.6% participated in some way – the highest proportion of all artforms.
  - This may be due to a significant increase in the number of adults participating in book clubs, which rose by 1.9 pp from 2.0% to 3.9%.
- Significant increases to engagement were seen across many audience groups:
  - Audiences of both sampled genders grew, with the male group increasing by 2.9 pp (from 8.3% to 11.2%) and the female by 2.0 pp (11.5% to 13.5%);

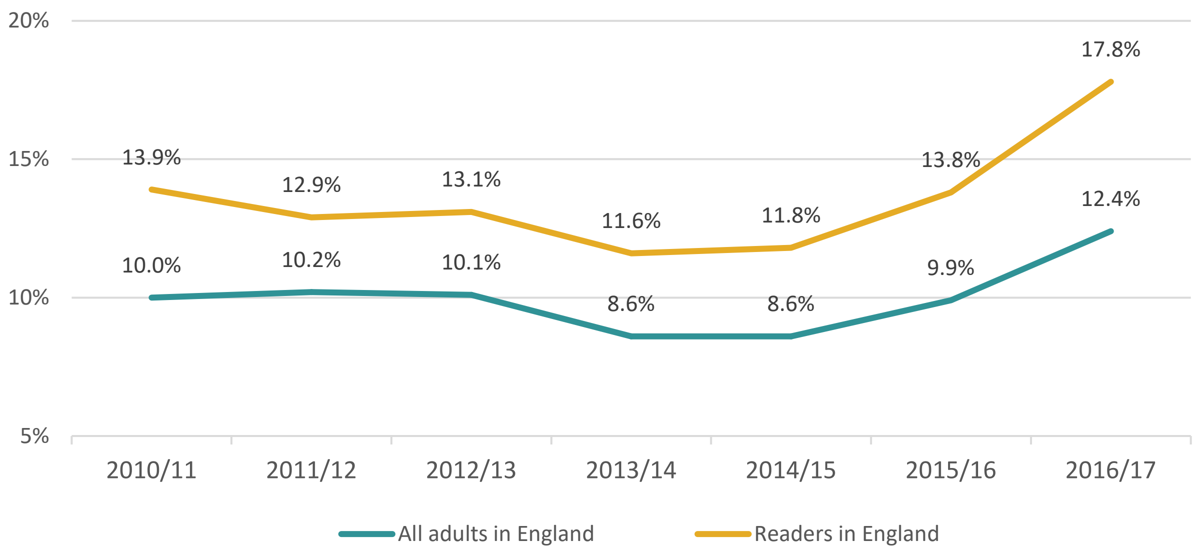
  - All age groups showed significant increase, with the exception of 16-24 year-olds: the highest was the 75+ group (increasing 4.7 pp from 6.9% to 11.6%) and the lowest the 45-64 group (increasing 2.3 pp from 9.9% to 12.2%) – all significantly higher than the 16-24 group, which only increased by 0.1 pp to 12.2%;
  - Both upper and lower socio-economic groups increased their engagement with literature in 2016/17: the upper by 2.8 pp (12.2% to 15.0%) and the lower by 1.8 pp (5.9% to 7.7%);
  - Both audiences who had a longstanding disability or illness and those who did not grew significantly – by 3.6 pp for the former and 2.1 pp for the latter;
  - In terms of ethnicity, only white ethnic groups showed significant increase, rising by 2.8 pp from 9.8% to 12.6%;
  - Engagement with literature significantly increased in the West Midlands (7.3% to 11.2%), South East (10.3% to 14.0%) and South West (8.9% to 13.6), and also had the second-lowest regional disparity of all artforms (a difference of 9.2 pp between London and Yorkshire).
- Gender, socio-economic group and region were the most statistically significant factors in an adult's likelihood to engage with literature:

Figure 50: Comparison of engagement in literature by audience demographic, 2010/11 and 2016/17



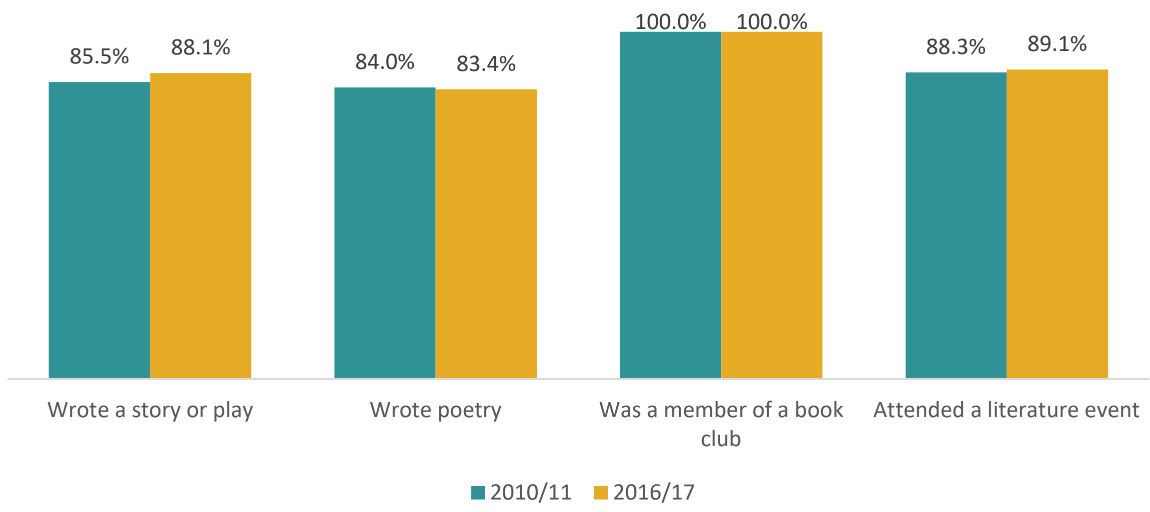
- As noted above (see 3.2), engagement with literature is classed as either participation through writing (e.g. stories, plays or poetry) or being a member of a book club, or attendance at events connected with books or writing (e.g. a literary festival); it does *not* include reading for pleasure.
- Taking Part does collect data on reading for pleasure (not including newspapers and magazines), however, and found that 62.3% adults did so in 2016/17 (the same proportion as in 2010/11).
- The survey also provided data on the sub-population of ‘readers’ (i.e. adults who stated they had read for pleasure in the past 12 months). There was a strong correlation between the trends outlined previously in this section (whole population of England) and those discernible among readers, with all statistically significant changes over time occurring in both populations.

Figure 51: Trends in adults engaging with literature in the past 12 months, by population



- This correlation reflects the fact that a high proportion of adults who engaged in a literature event or activity has also read for pleasure:

Figure 52: Proportion of adults who engaged in a literature event or activity *and* read for pleasure in the past 12 months, 2010/11 and 2016/17



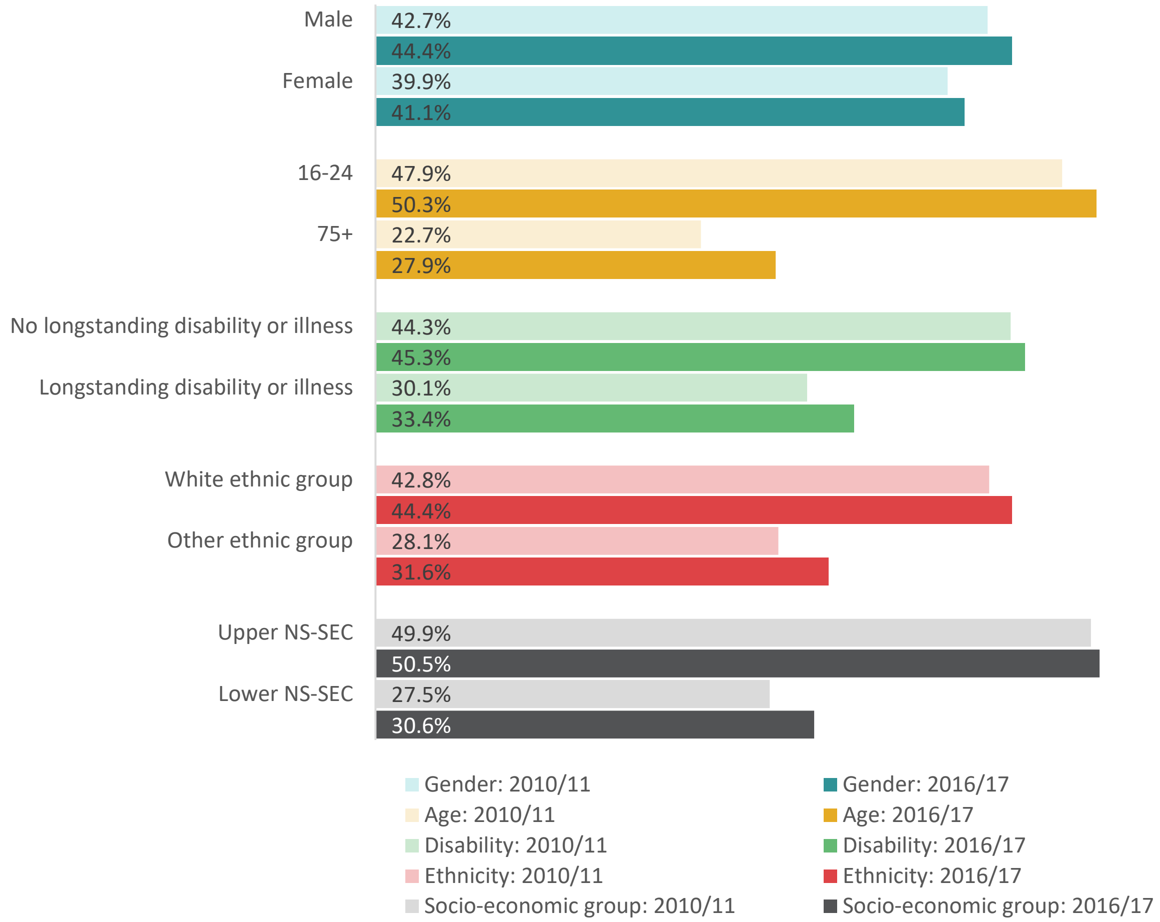
3.2.4. Music

- Engagement with music remained at a statistically similar level to 2010/11: again, the artform with second-highest engagement overall (in 2016/17, 3.9 pp lower than visual arts, at 42.7%).
- It also had the highest rate of attendance, having moved just beyond theatre (0.2 pp higher, at 37.6%). This was the largest growth in attendance across all artforms, rising 1.7 pp.

    - In terms of specific engagement with music, in 2015/16[5] 30.7% of adults had attended ‘other live music events’, with the most popular being rock music (67.6%) and soul, R&B and hip-hop events (29.4%).
- There were statistically significant increases in engagement with music in three of the five audience demographics:
    - Engagement rose slightly across all age-groups, but there was a significant increase among adults over 75 (7.2 pp, to 27.9%);
    - Adults in the lower socio-economic group were 3.1 pp more likely to engage with music, increasing from 27.5% to 30.6%; and
    - Adults with a longstanding disability or illness were 3.3 pp more likely to engage with music than in 2010/11, increasing from 30.1% to 33.4%.
- However, an adult’s likelihood to engage with music was influenced by all demographic characteristics: those who were young, white, better-off, male and/or had no longstanding disability or illness were all more likely to engage.
- The gap between groups in each demographic had decreased since 2010/11, with the except of gender which showed a very slight increase.
    - However, gender was still the smallest gap, with males only 3.3 pp more likely to engage than females;
    - Despite the growth in engagement among adults over 75, the gap with 16-24 year-olds was nevertheless the largest of any artform, and the largest across all audience groups’ engagement with music (22.4 pp); and
    - Engagement among adults with a longstanding disability or illness was 11.9 pp lower than those who did not – the largest gap of all artforms in this audience demographic.

[5] This question was not asked of the main survey sample in 2016/7, only the longitudinal sample. It is next due to be asked in 2017/18.

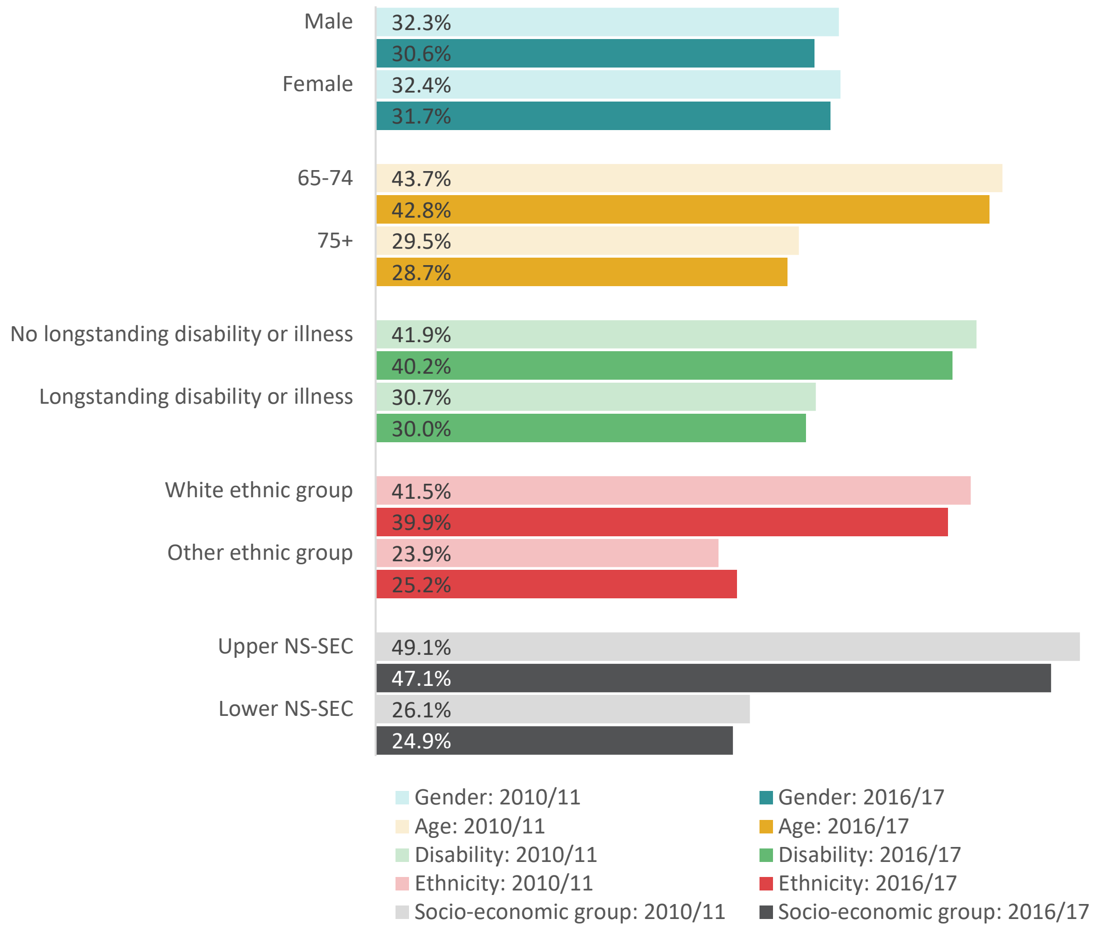
Figure 53: Comparison of engagement in music by audience demographic, 2010/11 and 2016/17



3.2.5. Theatre

- Nearly four in ten adults engaged in theatre in 2016/17 – a statistically similar proportion as 2010/11.
- Theatre had a high rate of attendance compared to other artforms – the highest in 2010/11 (39.2%) and second-highest in 2016/17 (37.4%) – though 2016/17 saw a 2.5 pp decrease in attendance of musical theatre.
- Participation has been consistently the lowest of all artforms (2.2% in 2010/11 and 1.9% in 2016/17).
- There were significant factors affecting engagement with theatre in all audience demographics:
    - Gender made the least difference, with females only 1.1 pp more like to engage; and
    - As in 2010/11, wealth had the largest impact on engagement with theatre, with a gap of 22.2 pp between upper and lower socio-economic groups.

Figure 54: Comparison of engagement in theatre by audience demographic, 2010/11 and 2016/17

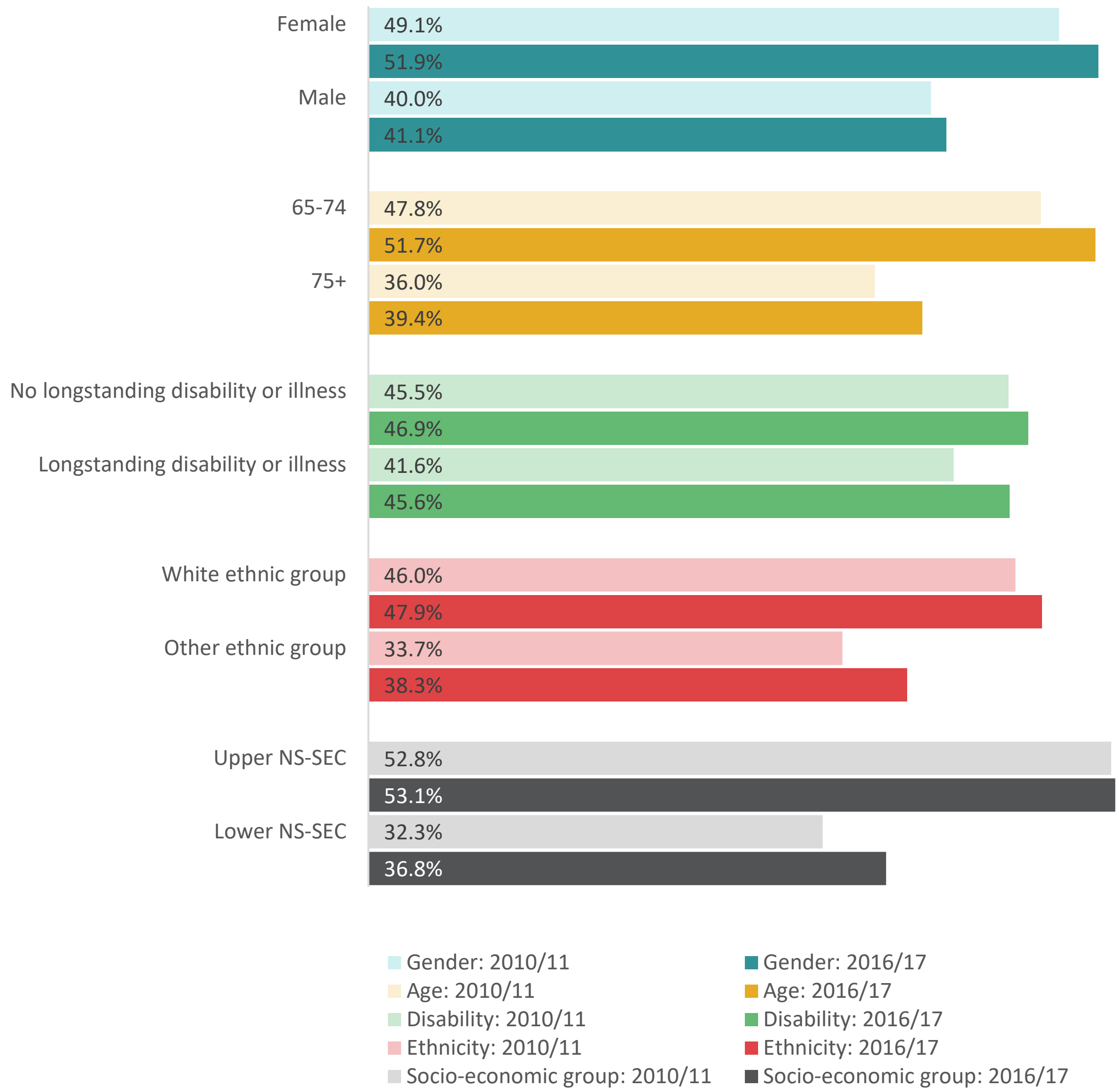


3.2.6. Visual arts

- Engagement is higher for visual arts than any other artform, with more than four in ten adults having engaged with it over the past 12 months (46.6%, a 1.9 pp rise since 2010/11).
- Participation was particularly high, with 21.1 pp more adults than music (35.6% compared to 14.5%). This represents a significant increase of 2.1 pp since 2010/11 (from 33.5% to 35.6%).
- The gap in rates of engagement between upper and lower socio-economic group decreased more for visual arts than any other artform (4.2 pp).
- There were statistically significant increases in overall engagement between 2010/11 and 2016/17 for the following demographic groups:
    - Female engagement rose by 2.8 pp from 49.1% to 51.9%, widening the gap with male participation by 1.7 pp to 10.8 pp;
    - Engagement in visual arts rose slightly across all age-groups, with significant growth among the 65-74 year-old group from 47.8% to 51.7%;

    - Adults with a longstanding disability or illness were far more likely to engage in visual arts in 2016/17 than in 2010/11, rising 4.0 pp from 41.6% to 45.6%, and making this the smallest gap in engagement for this artform (1.3 pp); and
    - Engagement among adults from the lower socio-economic group also grew significantly, by 4.5 pp from 32.3% to 36.8%.
- Yet several factors still have a clear impact on the likelihood of adults to engage with the arts:
    - While most demographics saw a decrease in the gap between each group's engagement in the artform, gender increased (with the gap between male and female adults' engagement with visual arts at 10.8 pp, as compared to 9.1 pp in 2010/11);
    - There was also a large disparity to be seen between age-groups, with the group most likely to engage (65-74 year-olds) at 12.3 pp more than the lowest (75+) – 51.7% as compared to 39.4%;
    - Although the gap between ethnic groups' engagement decreased by 2.7 pp between 2010/11 and 2016/17, audiences for visual arts were 9.6 pp more likely to be from a white ethnic group (47.9%) than from any other (38.3%);
    - As in 2010/10, socio-economic group had the largest impact on an adult's likelihood to engage with visual arts, with 53.1% in the upper group as compared to 36.8% – a gap of 16.3 pp (down 4.2 pp from 20.5 pp in 2010/11).

Figure 55: Comparison of engagement in visual arts by audience demographic, 2010/11 and 2016/17



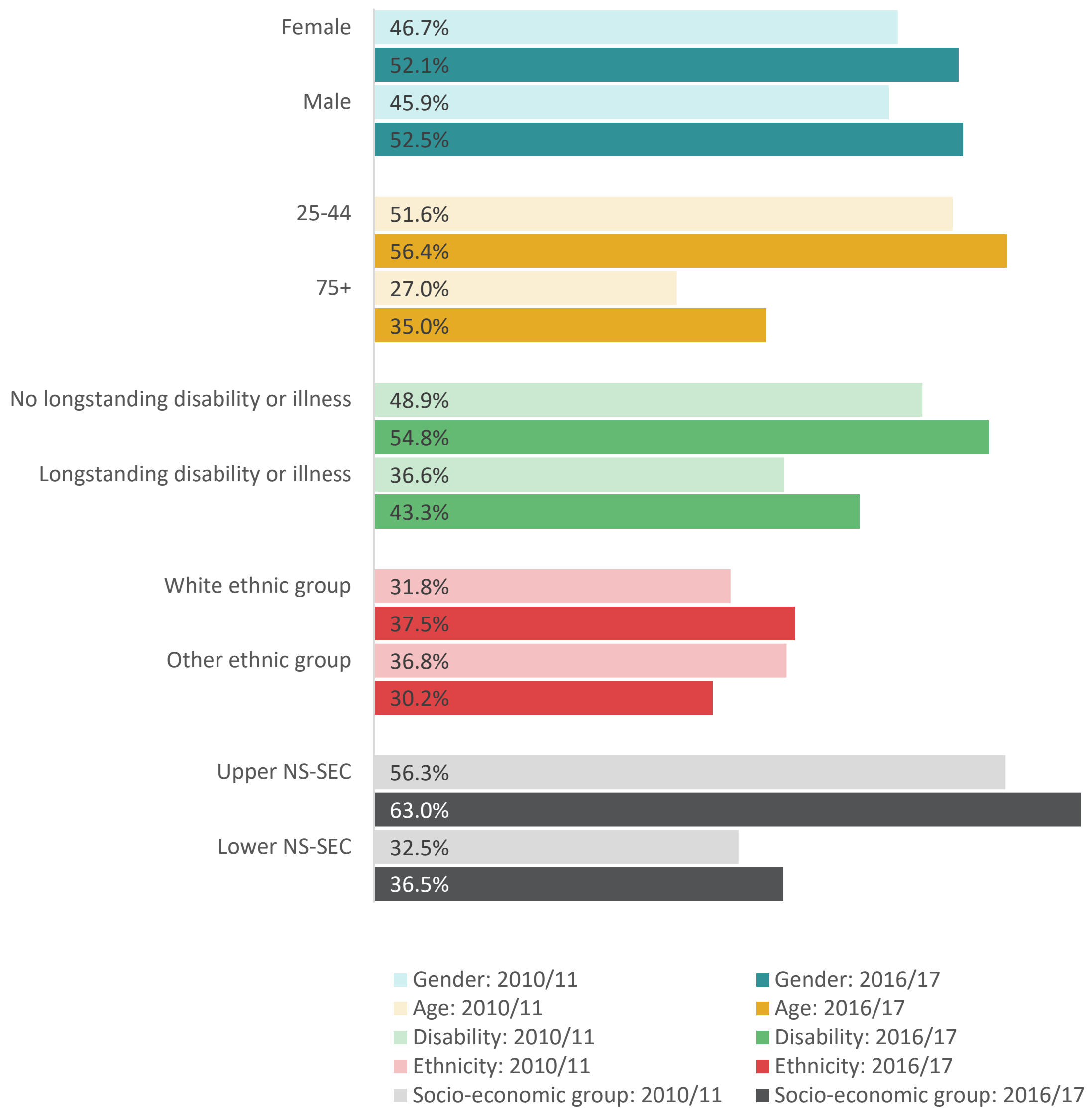
3.2.7. Museums and galleries

- Engagement with museums and galleries saw a significant increase across almost all groups in all demographics in 2016/17, with a median change of 5.8 pp.
    - The only decrease in engagement over the period was among non-white adults, falling 6.6 pp from 36.8% to 30.2%.
- The largest increases of engagement were among the following groups:
    - Adults aged 75 and over, rising 8.0 pp from 27.0% to 35.0%;
    - Adults with a longstanding disability or illness, rising 6.7 pp from 36.6% to 43.3%; and
    - Adults in the upper socio-economic group, rising 6.7 pp from 56.3% to 63.0%.
- There was a significant shift with regard to ethnicity, with the groups' engagement levels inverting over the period. The white ethnic group engaged 7.3 pp more than

other ethnic groups in 2016/17, whereas other ethnic groups had engaged 5.0 pp more than the white ethnic group in 2010/11 (a swing of 12.3 pp).

- The disparities between groups' engagement in each demographic remained broadly consistent with 2010/11 levels, with changes to the differences between groups ranging from a 2.7 pp widening (socio-economic group) to a 3.2 pp narrowing (age).
- As in 2010/11, the largest disparity of engagement was seen between socio-economic groups, with the proportion of adults in the upper group 26.5 pp higher than the lower in 2016/17; the smallest disparity was between genders, with the proportion of males 0.4 pp higher.

Figure 56: Comparison of engagement with museums and galleries by audience demographic, 2010/11 and 2016/17

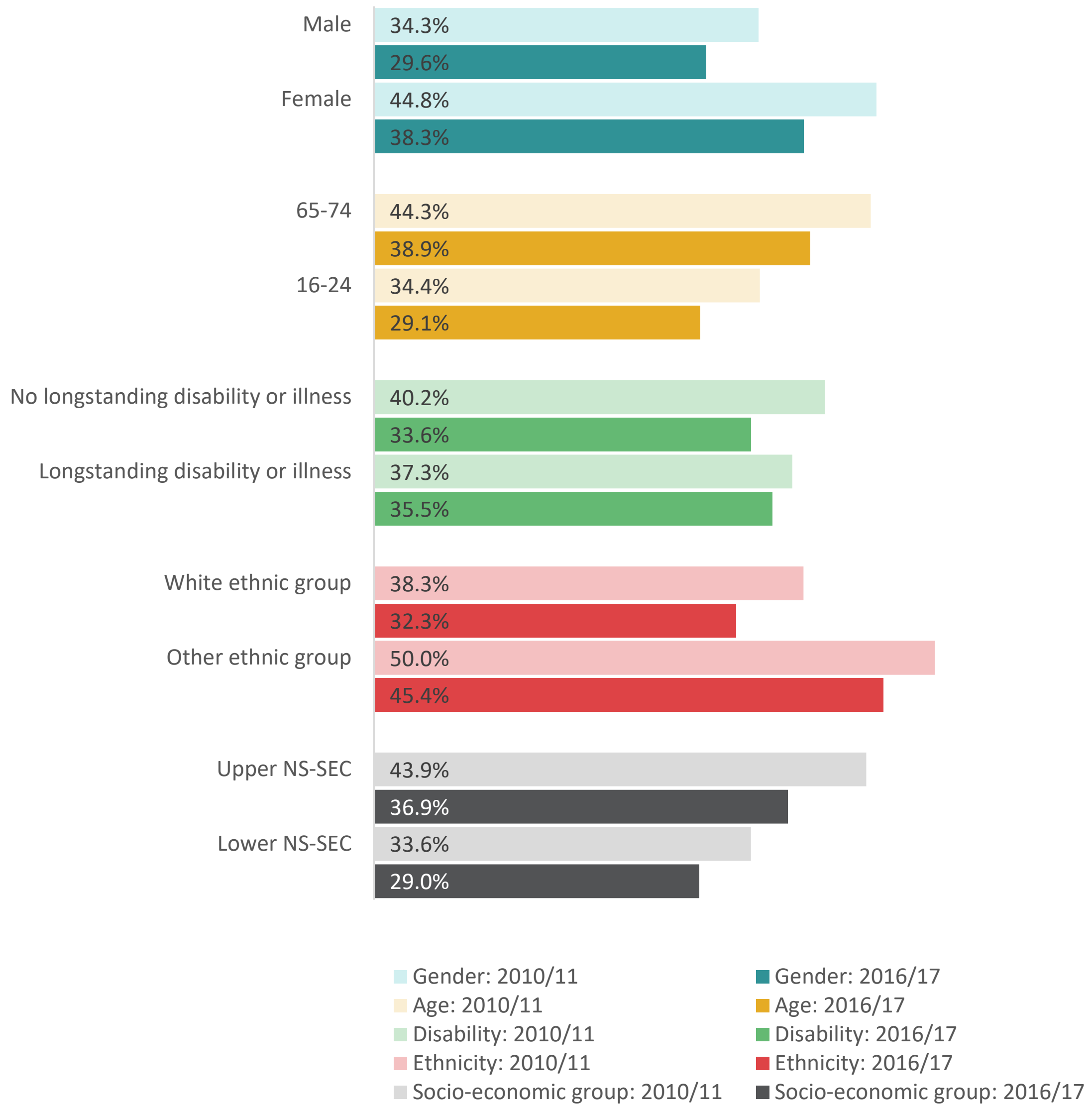


3.2.8. Libraries

- Engagement with libraries saw a significant decrease across most demographic groups in 2016/17.
- Groups which remained similar across the period include:

  - Adults aged 16-24 and 75+;
  - Adults who identified as disabled; and
  - Adults who were not white.
- The largest decreases of engagement over the period were among the following groups:
  - Adults in the upper socio-economic group, falling 7.0 pp from 43.9% to 36.9%;
  - Adults with no longstanding disability or illness, falling 6.6 pp from 40.2% to 33.6%; and
  - Adults males, falling 6.5 pp from 34.3% to 29.6%.
- The disparities between groups' engagement in each demographic remained broadly consistent with 2010/11 levels, with changes to the differences between groups ranging from a 1.4 pp widening (ethnicity) to a 2.4 pp narrowing (socio-economic group).
- As in 2010/11, the largest disparity of engagement was seen between ethnic groups, with the proportion of adults in the white ethnic group 13.1 pp lower than the other ethnic group in 2016/17. The smallest disparity – also the same as in 2010/11 – was with regard to disability, with the proportion of adults who did not identify as disabled only 1.9 pp higher than those who did.
- Libraries are unusual within arts and culture in the fact that other ethnic groups consistently engaged with them more than the white group (a difference of 11.7 pp in 2010/11 and 13.1 pp in 2016/17).
  - The only other category in which other ethnic groups engaged more than white groups in 2016/17 was dance – although with a difference of only 0.3 pp.

Figure 57: Comparison of engagement with libraries by audience demographic, 2010/11 and 2016/17



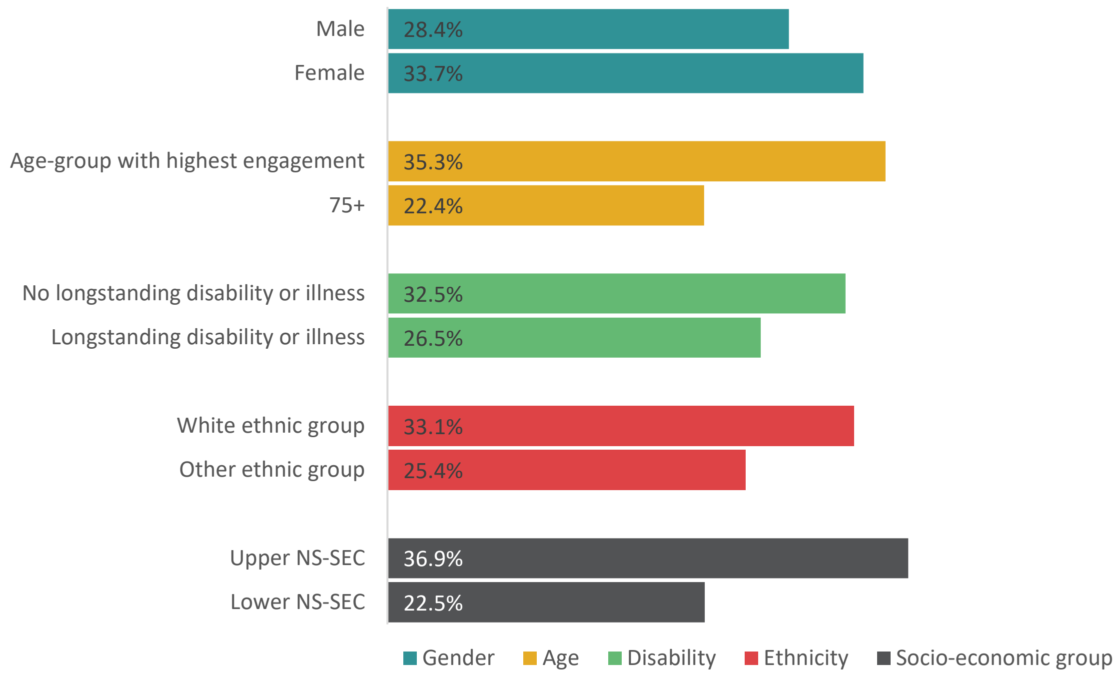
- ComRes (2016) have previously argued that people from a wider range of socio-economic backgrounds engage with libraries than they typically do with arts and museums. This suggests there is an opportunity for artists and arts and cultural organisations to work more closely with libraries in order to increase diversity within their sectors and provide a point of access to arts and culture for harder to reach groups. The report also highlights a need to focus more on diversity from a socio-economic perspective to ensure reflection; focusing on disabled and BAME groups is not necessarily reflective of the diverse range of people living in local areas – and particularly rural areas.

3.3. Audiences not engaging and participating in arts and culture

3.3.1. Taking Part data

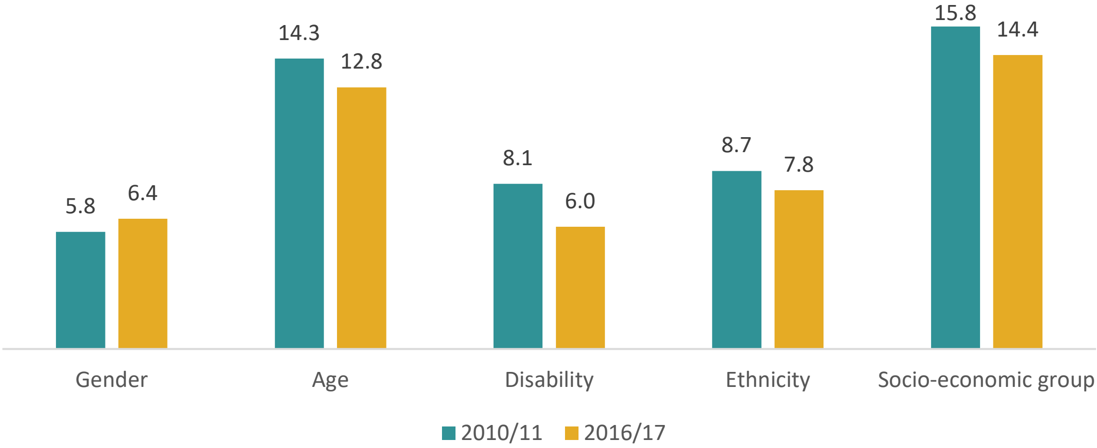
- Overall, the Taking Part data showed that adults were consistently less likely to engage with the arts and culture events/activities surveyed if they were 75 or over, male, less well-off, not white and/or had a longstanding disability or illness.
- There is a trend towards greater equality of engagement between groups in each demographic, however: as shown in Figure 59, the gaps between audience groups had decreased since 2010/11 in almost every demographic except gender (which nevertheless had the second-lowest gap in 2016/17).
- The largest factor affecting engagement was socio-economic group, with an average gap between groups of 14.4 pp across all artforms.

Figure 58: Comparison of average highest and lowest engagement with arts by audience demographic, 2016/17 [6]



[6] 'Age-group with highest engagement' was calculated by taking a mean average of the highest level of engagement for each artform in 2016/17. This was predominantly the 65-75 group (dance, literature, theatre and visual arts), with the 16-24 group for music and 25-44 for combined arts.

Figure 59: Average difference between highest and lowest engagement with arts by demographic, 2010/11 and 2016/17 [7]



3.3.2. Alternative models for measuring engagement

- However, recent research and thought-pieces about cultural engagement question some of the assumptions behind the Taking Part survey and suggest that cultural engagement may be much higher if the definitions of 'culture' and 'engagement' are widened. *Towards Cultural Democracy: promoting cultural capabilities for everyone* (King's College London, 2017) argues against the 'deficit model', which suggests that those who are not engaging with culture should be encouraged to engage more. The report cites several other sources that have made the same argument (Belfiore, 2016; Jancovich & Bianchini, 2013; Stevenson, 2013; Stevenson, 2016), stating that:

  "The deficit model disregards the wide range of ways in which people are involved in cultural creativity at times and in places that ostensibly have little or nothing to do with publicly funded organisations. It relegates many of these activities (and the people who do them) to second-class cultural status, or simply renders them invisible, sustaining dubious hierarchies of cultural value."
- It also references the Understanding Everyday Participation project at the University of Manchester, which is documenting the range of cultural activity taking place in parts of the country that have been considered 'cultural cold spots' because of their lack of publicly funded arts opportunities. For example, researchers working within this project have produced a briefing about cultural engagement in Gateshead which challenges the finding from the Active People survey that it is in the bottom 20% for cultural participation (Gibson, Taylor, & Edwards, 2014). The interim report found people in Gateshead were engaging in a very wide range of cultural activities, for a wide range of reasons. However, it also found a tension among local people between appreciating the cultural opportunities in Gateshead (The Sage, The Baltic) and perceptions of Gateshead as a 'working class' town.
- Ramsden et al (2011) explore the largely undocumented nature of the amateur and grass-roots arts and cultural activities taking place in local communities. The study reports that *"There are currently more than 49,000 amateur arts groups in England*

[7] Calculated as the mean average of differences between groups with highest and lowest, rather than the difference between average engagement.

with an estimated 5.9 million members, in addition 3.5 million people volunteer as extras or helpers making a total of 9.4 million participants in activities" (Voluntary Arts England, 2010). It is unclear whether these activities are captured in Taking Part.

- Leguina and Miles (2017), from conducting Multiple Factor Analysis of the available Taking Part data, argue that *"the composition of regional social spaces – that is the position of different social groups in relation to participation fields – might differ significantly… according to other types of demographic distinction; in particular ethnicity, gender and settlement type."* They discover a far higher discrepancy of engagement between ethnic groups than had previously been suggested in the literature, and which varied regionally: digital engagement among ethnic minorities, for instance, is particularly significant outside of London – something which may be of significance for mapping engagement when taken in conjunction with calls to widen understanding of what constitutes 'culture'.

3.4. Factors influencing adults who do not engage with arts and culture

3.4.1. Personal taste, preferences and motivations

- Analysis of the Taking Part longitudinal report discussed the reasons why adults had either increased or decreased the frequency of their engagement in arts and cultural activities (TNS BMRB, 2016). Those who had decreased their engagement in the past 12 months were asked to identify the main reason why they were no longer engaging as much. Preference for other activities "There were other things I preferred doing in my leisure time" emerged as the second most common reason for decreased engagement in arts activities, attending arts events or attending a museum or gallery (cited by 9%, 11% and 13% respectively). This suggests that for some people competing activities take preference over arts and cultural activities when individuals are making decisions about how to spend their leisure time, even if they have previously engaged in the activity.
- The availability of interesting or attractive events, activities or exhibitions emerged in the Taking Part Longitudinal report as commonly cited reasons for increased or decreased engagement (TNS BMRB, 2016):
    - 12% of those who had increased their arts attendance cited 'There were more events that interested me in the past 12 months' as the main reason – the second most common reason for increased engagement;
    - The third most commonly given reason for increased attendance of museums and galleries was 'There were more exhibitions that interested me in the last 12 months', cited by 10% of adults;
    - 9% of those had who decreased their arts attendance cited as their main reason 'There were fewer/no events that interested me' – this being the third most common reason for decreased engagement.
- The fourth most commonly given reason for decreased attendance of museums and galleries was 'There were less/no exhibitions that interested me in the past 12 months', given by 6% of adults.
- The Warwick Commission's report on cultural value (2015) argues that low levels of engagement with culture have come about not just because of lack of access to

culture but because the cultural offer does not match people's tastes and preferences. It supports this assertion with evidence of high participation in other sectors which meet people's tastes better. For example, it found that:

  - 2/3 of adults listen to the radio regularly and 70% of those do so to enjoy music; and
  - 96.5% of the British population have been reached by the BBC.

- In their report on Cultural Value, Crossick and Kaszynska (2016) considered the participation/engagement gap in engagement between higher and lower socio-economic groups. They argue that this is not caused by a lack of demand amongst the public, per se, but a mismatch between the public's taste and the publicly funded cultural offer. They believe this mismatch is exacerbated by the narrowing of cultural education in schools which acts to limit the broadening of tastes. Furthermore, a lack of representation, how certain social groups are portrayed in the media and how some groups self-identify can serve to entrench or undermine existing inequalities.
- The views of Crossick and Kaszynska are supported by recent focus groups with lower social grade and less engaged adults in England (ICM Research, forthcoming). Overall, the key consensus was that cultural preferences are highly personal and that something that is appealing to one person may not be so to another. Furthermore, the most common barrier to engagement was that certain activities were not of interest to the individual; however, this didn't tend to be based on first-hand experience but rather on overall perceptions of the activity. In some cases, an unenjoyable first-hand experience – usually when younger and in an educational context – had acted to discourage engagement in later life. It was usually the traditionally 'highbrow' activities like theatre and fine art that were mentioned in this context, suggesting the importance of experience during the younger years in forming tastes and preferences in adulthood.
- Similarly *Taking Part 2016/17* (DCMS, 2018a) indicates that adults who had visited libraries, museums and galleries as children were significantly more likely to have attended a library, museum or gallery as an adult in the past year. Likewise, adults that had not visited libraries, museums and galleries as children were significantly less likely to have attended a library, museum or gallery as an adult in the past year.
- In their review, Crossick and Kasynska also considered BAME communities and individuals, noting that what is perceived as a lack of engagement could actually be due to cultural tastes, preferences, engagement and production that is not recognised within the mainstream (Crossick & Kaszynska, 2016). They reference a study by Newman et al (2013) which highlighted the difficulties in getting older British Asian participants in a research study for museums:

  "None of the participants was from black and minority ethnic groups. When asked they declined to become involved in the research. When asked why, a group of women of Pakistani origin from Gateshead replied that the exhibitions were of no cultural relevance to them. However, if crafts from their home country were being shown they would have attended."
- The Warwick Commission (2015) argues that lack of diversity among those producing culture is in large part responsible for the gap between what BAME audiences want and the cultural offer that is provided (more information on this issue

is provided in the previous chapter of this review). This is supported by Consilium's review of the literature on equality and diversity in the arts and culture (Consilium, 2014).

- Consilium (2014) also found evidence that local interests or content relating to local identity are of greater importance to lower socio-economic groups than any other (Fresh Minds, 2007).

3.4.2. Perceptions of 'arts and culture' forms

- There is currently no consistent, internationally agreed definition of culture. It is defined by different bodies and organisations in different ways. Recently, DCMS has proposed a definition of the Cultural Sector that best reflects UK policy based on the availability of data through the existing standard industrial classification (Department for Digital, Culture, Media and Sport, 2016a, revised 2018). For the Arts Council, arts and culture are often defined in reference to the broad artform and specific artform classifiers. Sometimes, however, 'culture' can just be a shorthand for 'the state-supported cultural sector' (Taylor, 2016) – thereby creating a circularity in the definition of 'culture' which risks confusing its meaning: activities are eligible for public funding because they are defined as 'culture', whilst they are defined as 'culture' precisely because they are publicly funded. The Arts Council's role in creating these definitions, therefore, is pivotal.
- This is not simply a question of semantics, however: definitions and labels, including those imposed by individuals, can influence engagement in arts and culture (and whether that engagement is classed as such).
- O'Brien and Oakley (2015), argue that consumption and production of culture create 'circuits of culture' which exclude some types of people and include others. This is described as "*The relationship between who gets to 'consume' and who gets to 'make' and what is at any time considered legitimate culture."* They also argue that there is a lack of accurate data to measure the scale of the inequality of cultural consumption and production, but particularly in relation to production.
- In their AHRC report on *Understanding the Value of Arts and Culture*, Crossick and Kaszynska (2016) argue that many discussions on trends in cultural engagement are complicated by a narrow definition of arts and culture which can be viewed through hierarchies of taste, public funding or both. It is suggested that a wider definition of 'culture' which includes more informal activities which may be described as 'leisure' rather than arts and culture may better capture the trends of participation across different groups (particularly lower socio-economic groups). They argue that the problem may not be that people are not engaged, but rather that they are differently engaged.
- The University of Manchester's Understanding Everyday Participation project explores the potential cultural value of everyday activities, such as going shopping, walking the dog, talking to neighbours etc. Miles and Sullivan (Miles & Sullivan, Understanding participation in culture and sport: Mixing methods, reordering knowledges, 2012) conclude that *"what matters for health and well-being appears to be participation per se, rather than a particular set of tastes and practices"*. Given this, Miles and Gibson (2016) highlight the insufficiency of *"an orthodoxy of approach to cultural engagement which is based on a narrow definition (and understanding) of*

participation, one that focuses on a limited set of cultural forms, activities and associated cultural institutions but which, in the process, obscures the significance of other forms of cultural participation which are situated locally in the everyday realm".

- O'Brien and Oakley (2015) also suggest that understanding barriers to cultural consumption can only be understood through a nuanced understanding of the way that different culturally identifying groups see themselves in relation to culture and want to consume and produce culture.
- On behalf of Arts Council England, in Spring 2017 ICM Research conducted a series of focus groups across England in Bradford, Coventry and Peterborough (ICM Research, forthcoming). In total, 24 members of the public participated in the research. All participants were from lower social grades and defined themselves as less or not at all interested in the arts.
- Overall, participants took a broad view of what was included in culture, including both more traditional forms such as theatre, dance and visual arts as well as other activities such as foreign travel, gastronomy and listening to music. However, it was clear that people were tending to distinguish between what may be termed as 'highbrow' and 'lowbrow' culture. Of particular importance was the characteristics ascribed to these two categories; whereas 'highbrow' culture was associated with education, formality and sometimes hard work, 'lowbrow' culture was viewed as being enjoyable and not necessarily worthy or educational. This distinction could act as an important barrier against engagement for this group, those 'highbrow' cultural activities and events did have some potentially negative associations and therefore may impact on the likelihood of them engaging in the future.
- The research also found that some people are put off attending cultural events or going into venues because they feel they need to act in a certain way that would make them uncomfortable. This was commonly described in relation to galleries, museums and plays (in contrast to musical theatre) where there was a perceived need to 'sit quietly and act politely' rather than 'letting loose and having unrestrained fun'. Similarly, some felt nervous because they did not know the 'rules' or the established etiquette of these cultural institutions well enough to engage. When asked directly about whether or not cultural activities were 'not for them' most participants did not feel this was the case; however, during the discussions participants did suggest examples of the types of characteristics which those who engage in cultural activities possess, for example there was an association between attending plays, museums and galleries with intelligence and 'stuffiness'.
- Consilium (2014) found evidence that *"trust is a fundamental issue for lower socio-economic groups with studies showing that institutional or public service provision is generally viewed with scepticism and mistrust, possibly as a result of poor past experiences"* (Fresh Minds, 2007).
- In contrast there are several studies exploring the idea that elite social groups are now being presented as 'cultural omnivores' who engage in many different forms of cultural activities rather than being restricted to 'an established canon of taste or institutions' (Crossick & Kaszynska, 2016; O'Brien & Oakley, 2015; Savage, et al., 2013). This suggests that for some more engaged groups older barriers to engaging with a wider range of cultural activities may be breaking down. However, there is also

some research questioning whether the ‘cultural omnivore’ is a widespread phenomenon (Chan, 2013).

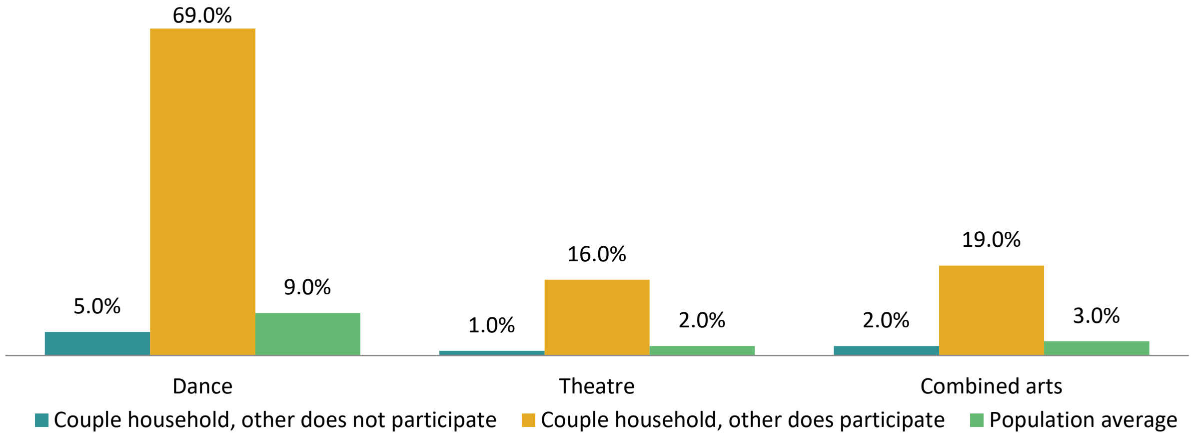
- The linking of ‘elite’ groups with arts and culture may also factor in McAndrew et al’s finding of a correlation between levels of engagement and a ‘Leave’ or ‘Remain’ vote in the 2016 EU (McAndrew, O'Brien, & Taylor, 2018). By examining the relationship between culture and values using UK data from the Active People and British Social Attitudes surveys, they noted that *“areas where the population visits museums and attends artistic events more regularly were more likely to feature a high vote for ‘Remain’”.*
- Coupled with the fact that *“the values of arts workers are the most liberal of all sectors…, as well as the most pro-welfare, and the most Left-oriented on average*”, there is a danger that – beyond protected characteristics – cultural institutions may not represent adults with more conservative values. Crucially, there is evidence of *“a divergence in worldviews between those tasked with representing the nation to itself and those who inhabit it”* (McAndrew, O'Brien, & Taylor, 2018).
- King’s College London (2017) proposes redefining culture to include ‘everyday cultural creativity’ and to provide ‘conditions of cultural opportunity’ that they describe as ‘cultural capability’ to maximise the potential of everyday cultural creativity. In summary the report argues that:
    - The professional arts and creative industries are interdependent and interconnected with everyday cultural creativity;
    - Different environments can enable or suppress people’s everyday cultural creativity; and
    - Recognising and valuing the full range of everyday cultural creativity is an essential step in addressing the issue that only a small proportion of the UK population makes regular use of publicly funded cultural organisations.

3.4.3. Partners and other adults in the household

- The Understanding Society survey aims to interview all adults and children over the age of 10 years old in the household, and, as a result, the NatCen analysis of the Understanding Society dataset (2013/14) was discussed engagement in arts and culture at a household level (NatCen, 2017). Across the arts and culture sectors, the data consistently showed that people were much more likely to engage if other adults in their household were engaging. Furthermore, whereas engagement was highest amongst those living with another engaging adult, it was lowest amongst those who lived with a non-engaging adult with those living in single adult households taking an intermediate position.
- As shown in Figure 60, the likelihood of participation in certain arts activities (dance, theatre and combined arts) was increased more than that of participation in other arts activities by the presence of a participating spouse in the household, showing a strong household ‘cluster effect’. For these activities, which people tend to participate in with other people, it could be that having others in the household who participate could be an encouraging factor. These findings suggest that that other household members might play a key role in encouraging, or dampening, enthusiasm for

cultural activities while also reflecting the likely clustering of people of similar characteristics and interests in households.

Figure 60: Adult art participation by engagement of other partner in household



Source: Understanding Society Survey 2013/14 – NatCen Social Research analysis

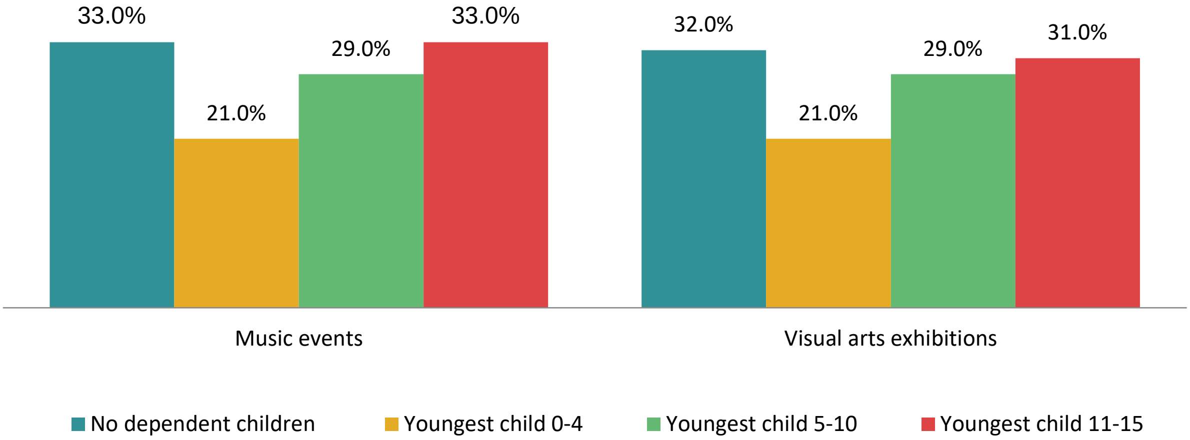
- During ICM Research's focus groups with less culturally engaged and lower SEG adults, several participants mentioned that the interests of partners or friends have encouraged them to engage more frequently with cultural events and activities (ICM Research, forthcoming).

3.4.4. Children

- It is apparent from the Taking Part Longitudinal report that encouraging children and broadening their interests in arts and culture were important factors in increasing adults' own engagement (TNS BMRB, 2016). The second most commonly cited reason for increased arts participation and museum attendance was 'I wanted to introduce my child to new activity/ encourage by child's interests and learning'. Furthermore, the most common reason for adults' increased use of public library services was 'I wanted to encourage my child to read books'.
- Through analysis of the Understanding Society survey, NatCen were able to examine how the presence of children in the household relates to adult engagement in arts and culture (NatCen, 2017). The analysis shows that the presence of a very young child in household (aged 0-4) relates to lower arts attendance, arts participation and visits to museums.[8] This is particularly the case for attendance of music events and visual arts exhibitions; as shown in Figure 61 whereas a third (33%) of adults with no children in the household attended a music events this is only the case for one in five (21%) adults with a pre-school child in the household. Although this may reflect the general time pressures on parents with young children, as well as the relative difficulty of attending events outside the home for this group, it may also reflect a lack of early years provision and focus in the sector.

[8] The exception to this is concerning attendance of combined arts events and public library use.

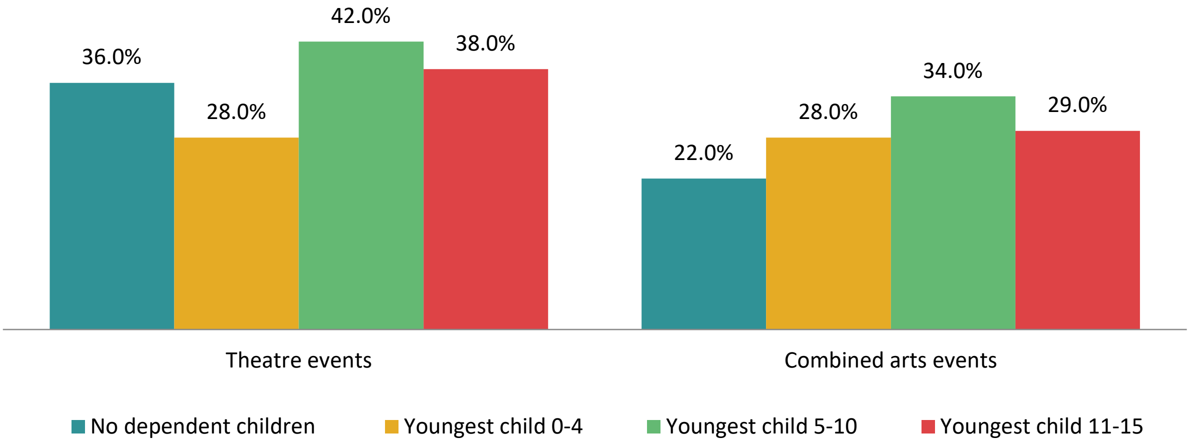
Figure 61: Adult art attendance by presence of children in the household (music events and visual arts exhibitions)



Source: Understanding Society Survey 2013/14 – NatCen Social Research analysis

- On the other hand, adults in households where the youngest child was primary school aged (5 to 10 years old) were significantly more likely to have attended arts events, visited a museum or gallery or attended a public library, than other groups.
- Adults living with a child aged between 5 and 10 years were the most likely to have visited museums and galleries, followed by those living with older children aged 11 to 15. Those living with under 5s were less likely to have visited museums and galleries.
- As shown in Figure 62, theatre and combined arts events were of particular appeal for adults in households where the youngest child was aged 5 to 10. It may be that these types of events are particularly inviting to parents of primary school children, or that there is good provision and availability for these artforms.

Figure 62: Adult art attendance by presence of children in the household (theatre events and combined arts events)



Source: Understanding Society Survey 2013/14 – NatCen Social Research analysis

- With regards to adult arts participation, the NatCen analysis found that those with no children in the household or older children (aged 10 to 15 years old) had the highest rates of acts participation and those with pre-school children the lowest. Young children were also associated with lower frequency of participation among those who did participate (57% participating weekly, vs 64% overall), perhaps owing to the time demands and unpredictability of caring for young children.

- Indeed, adults living with under 5s were less likely than those with older children to engage in dance, literature, theatre and combined arts activities. Looking at patterns over time, adults (including new parents) who were newly living in a household with children were less likely to have increased engagement in arts activities.
- Participants in ICM Research's focus groups with less culturally engaged and lower social grade adults suggested that many get involved with particular cultural activities with the sole aim of introducing their children to cultural experiences, reflecting the Taking Part longitudinal survey results discussed above (ICM Research, forthcoming).

3.4.5. Others

- More generally the importance of others who are engaging in activities, whether within or outside of the household or family, is clear from the Taking Part longitudinal report (TNS BMRB, 2016). The third most commonly cited reasons for an increase in arts attendance and participation, and the fourth most commonly cited reason for increased museum attendance, was 'I enjoy doing the activity/going to these events with other people/socialising through the activity'.
- As stated above, evidence from ICM's focus groups suggests that adults from lower socio-economic groups are influenced by the engagement of their adult friends (ICM Research, forthcoming).
- Interestingly, findings from NatCen's analysis of the Understanding Society dataset found higher levels or arts and culture engagement amongst adults who are providing a moderate level of unpaid care, defined as less than 20 hours per week (NatCen, 2017). Furthermore, those who had become new carers between surveys were more likely than non-carers to have taken up visits to museums, heritage sites and libraries. More research is needed to unpick these findings, specifically whether carers engaged in arts and cultural activities with the people they cared for, or whether the adoption of a caring role had changed their lifestyles in a way that left more time for cultural activities.
- The CASE Report *Understanding the drivers, impact and value of engagement in culture and sport* (CASE Programme, 2010) found that people who consume culture and sport television programming at home are more likely to engage in cultural and sporting activities. This suggests that media consumption habits can be a predictor of engagement or non-engagement with cultural activities.

3.4.6. Cost and affordability of arts and culture

- The Consilium evidence review on equality and diversity notes that the evidence suggests that people with higher incomes are less likely to be arts participants (Consilium, forthcoming). It points to an unexpected finding of the analysis by Dr Aaron Reeves on arts participation and the social strata (Reeves, 2015) that those with higher incomes are less likely to be arts participants. He references earlier work that observed that the privileged work longer hours than the less privileged, and that it is ‘busyness’ rather than ‘leisure’ that is viewed as the ‘new badge’ of social prestige. However, this discussion is restricted to arts participation, rather than arts attendance.

- The NatCen analysis of the Understanding Society dataset (2013/14) examined engagement by both self-assessed financial circumstances and household income (NatCen, 2017). Looking at self-assessed financial circumstances, when controlling for other demographic factors, lower rates of arts participation, arts attendance and museum and gallery visits were seen amongst those who assessed themselves as ‘finding it difficult financially’ than those defining themselves as ‘living comfortably’. For arts attendance, this association held for all types of arts events, though the size of the difference was smaller for combined arts which may reflect the greater likelihood of these types of events being free to attend. Similarly, there was a clear association between self-reported household income and arts participation, arts attendance and attendance of museums and galleries: with lower engagement amongst those with below average household income.
- Another NatCen report, *Social Research: Culture, Sport and Wellbeing* (2017) indicated that adults who were not in employment or full-time education were the least likely to have taken up attendance at arts events, while full-time students were more likely to attend than other groups.
- The NatCen report highlighted that whereas previous analysis across the past decade, from a number of sources, has consistently shown that engagement in most cultural sectors is positively associated with income, the opposite case is true for public library use. That is, those in lower income brackets have tended to have higher library use than those with higher income. Analysis of the Understanding Society dataset showed no significant differences in the likelihood of using a public library use by either self-assessed financial circumstances or household income.
- The ICM focus groups with less culturally engaged adults from lower SEGs found that the cost of culture was noted as barrier to engagement, and most frequently referenced in relation to the theatre. Several people remarked on the cost not only of the tickets themselves, but of the associated travel, food and drinks. However, the cost of culture was framed as a barrier to frequent participation rather than something that would necessarily put people off ever taking part.

3.4.7. Availability and accessibility of arts and culture

- The particular engagement barriers experienced by older people are discussed in the Consilium evidence review on equality and diversity (Consilium, forthcoming). It was noted that older people often experience a range of social, physical and mental barriers to engaging with arts and cultural activities, many of which related to availability and accessibility. The review stated that it is important that policy makers include arts and cultural activities as key components in holistic health and social care policies for older people and that currently too few cultural institutions seek out older audiences.
- The Taking Part longitudinal report demonstrates the importance of the availability of time when examining arts and cultural engagement over a three-year period (TNS BMRB, 2016). Across arts, museums and libraries, having more free time was the most common reason given for participating more often. Conversely having less free

time was the most common reasons for participating less often. Other time related reasons were also commonly cited as reasons for decreased engagement, for example 8% of people who were participating in the arts less often stated ‘My work demands increased’ as the main reason, as did 6% of those who were attending museums and galleries less often.

- The ICM focus groups with less culturally engaged adults from lower SEGs found that lack of time is one of the more common reasons provided for not engaging in certain cultural activities.
- The NatCen analysis of the Understanding Society dataset (2013/14) allowed for analysis of engagement with arts, museums and libraries by detailed working status whilst controlling for other factors (NatCen, 2017). The analysis showed that full-time students were the most likely to take part in arts activities, attend arts events, visit museums and galleries, and visit libraries which is suggested may reflect the relatively high availability of disposable time as well as the breath and ease of access of opportunities to get involved during student years. Whereas students were the most likely to have used a library service, those in full time-employment were the least likely followed by those in part-time employment and the unemployed. This shows a relationship between employment and the use of public library services; however other factors are likely to be related to engagement.
- The Understanding Society analysis does not fully correlate engagement with disposable non-working time across all sectors, suggesting that the relationship is more complex than simply ‘time’ to engage:
    - There were no differences in overall arts activity participation between those in full-time, part-time or non-employment when controlling for other factors;
    - There was no difference in arts attendance between those in full-time and part-time work when controlling for other factors, however those who were non-employed were significantly less likely to have attended than those in employment or education; and
    - There were no differences in museum and gallery attendance between those in full-time, part-time or non-employment when controlling for other factors.
- Geography can also impact engagement in several ways. A visit to a library, for instance, may well form part of a ‘trip-chaining’ activity (the practice of undertaking more than one activity while out of the house) which takes in various other everyday places. For this reason, engagement is far more dependent on the organisation’s proximity to other amenities (e.g. supermarkets) and accessibility via public transport, since it is less likely to constitute the primary reason for travel (Delrieu & Gibson, 2018).
- There is also a widely documented disparity of funding in different regions across the country. O’Brien and Oakley (2015) explore inequalities of public funding of the arts in different geographies across England, which they suggest can lead to unequal cultural production and therefore access to the arts. They cite studies looking at the impact of distance travelled on attendance as evidence for less access to arts and culture in remote areas. The Audience Agency’s research supports this finding (Audience Agency, 2015), with a survey that found that a third of visitors to galleries

are from within a 15 minute drive time of that gallery, a figure which increases to 40% when only galleries outside of London are considered.

- Findings from ICM Research's focus groups with less culturally engaged and lower SEG adults highlighted a range of barriers related to accessibility and availability (ICM Research, forthcoming). The need to travel to a bigger city in order to be able to engage with arts and culture was identified as a factor preventing people from taking part in activities more often. However, this was likely to be related to the participant's definitions and conceptions of arts and culture as something which took place in larger metropolises such as London.
- However, the Arts Council's *Rural Evidence Review* (Arts Council England, 2015a) found that participation in the arts overall was actually higher for people living in rural areas. There were similar levels of attendance of museums among urban and rural residents. On the other hand, people living in rural areas less likely to have visited a library recently than those in urban areas.
    - AEA Consulting (2016) also found barriers to engaging with digital culture, including poor internet connectivity, particularly among people living in rural areas.
- Consilium's 2016 literature review about equality and diversity in arts and culture (forthcoming) highlights that access issues that may be faced by disabled people wishing to participate in arts and culture. For example:
    - Research by Potter (2015) which investigated the barriers to accessing mainstream arts opportunities for disabled and/or marginalised groups. The report was based on a survey of disabled and/or marginalised respondents and stated that in order to increase participation of these groups there was a clear need for financial support, improved physical access, increased information/awareness and greater acceptance of diversity within and across the arts. The report also noted that genuinely inclusive and robust user testing models and user-led design can improve access and hence engagement for disabled audiences.
    - Research by Shape Arts (2013) describes the variability in provision of access schemes across the sector, including eligibility restrictions and limitations to support provided. This research also found that the issue of travel to and from a venue can be as much of a barrier to access as the venue itself.
    - It also points to a report by Attitude is Everything (2014) which states that 95% of disabled people experienced problems in buying tickets, and particularly that while they preferred to buy tickets online most venues do not allow people to purchase disabled tickets online.
- Wright et al's *Cultural Value Project Research Development Award* (2014, cited in Crossick & Kaszynska, 2016) concluded that the 'deaf, deadened, hard of hearing, blind and partially sighted' are in danger of being disenfranchised. Highlighting research from the European Blind Union, the accessibility of cultural activity with arts and cultural organisations and their funders showing little regard to the access requirements of potential audiences that deviate from the assumed norm. Wright et al do highlight successful examples in the past, such as STAGETEXT and Vocal

Eye's See a Voice project in 2006 but note that since them many initiatives have suffered setbacks.

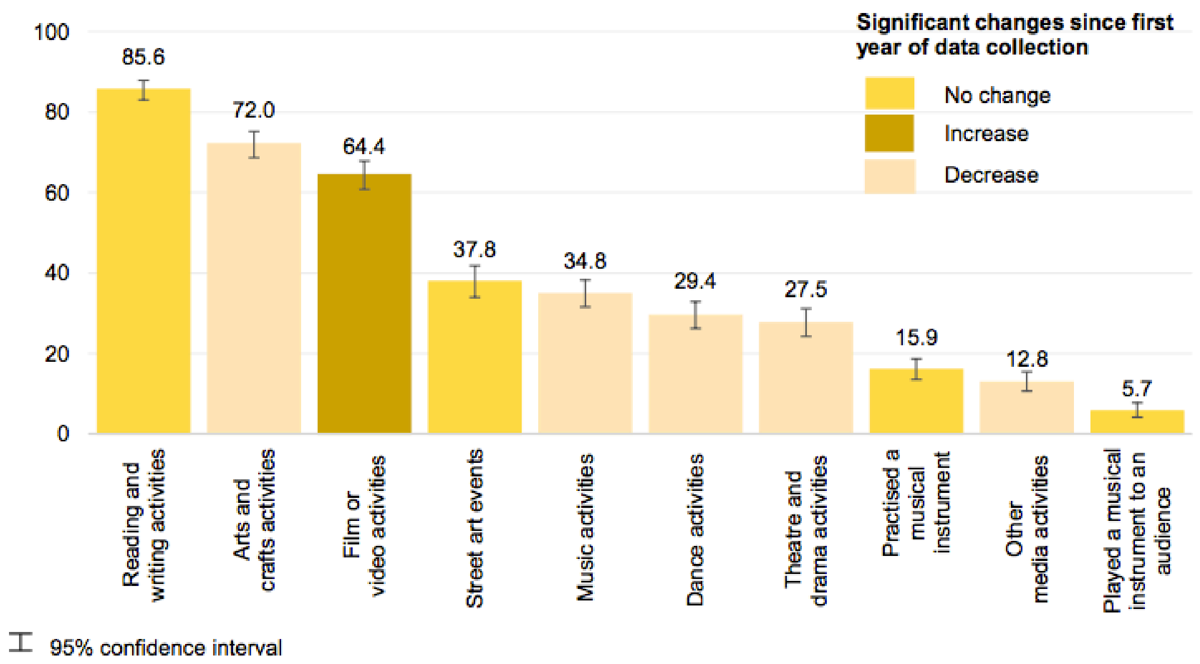
- An evaluation of a BookTrust initiative to reach children with additional needs (Robinson, Moore, & Parker, 2016) emphasised the importance of personalisation in making reading for pleasure accessible to them. They stressed the importance of a 'whole person' approach, taking into account *"a complex set of factors inclusive of children's impairment(s), sensory preferences, stages of development, personalities, life-situations, capabilities and ages".* The evaluation also notes the lack of appropriate reading material available for children with different sensory needs and impairments.

3.5. Engagement of children and young people in arts and culture

3.5.1. Overall rates of participation and/or attendance in arts activities, 5-10 year-olds

- Between April 2016 and March 2017, almost all children aged 5-15 had engaged with the arts either inside or outside school at least once in the last year (97.4%). This was a similar proportion to 2008/09 (98.0%) and to 2015/16 (98.3%).
- If reading and writing are excluded from the list of arts activities, the overall proportion for arts engagement in the last 12 months becomes 94.0% in 2016/17.
- In 2016/17, the majority of children aged 5-15 (87.3%) had engaged with the arts in the last week, compared to 85.9% in 2008/09 and 89.4% in 2015/16.
- Looking at 5-10 year-olds only, Figure 63 shows engagement outside school in the past year with various activities. Figure 64 shows engagement outside school in each activity year-on-year between 2008/09 to 2016/17.

Figure 63: % of 5-10 year-olds that have engaged with each activity in the last 12 months, 2016/17



Source: (Department for Digital, Culture, Media and Sport, 2017b)

Figure 64: % of 5-10 year-olds that have engaged with each activity in the last 12 months, 2008/09 – 2015/16

	08/09	*09/10*	*10/11*	*11/12*	*12/13*	*13/14*	*14/15*	*15/16*	*16/17*
Dance	43.1	45.1	42.2	**30.0**	**29.3**	**30.4**	**27.4**	**26.9**	**29.4**
Music	55.3	55.4	**50.7**	**40.9**	**36.3**	**37.3**	**36.6**	**34.2**	**34.8**
Theatre and drama	47.1	49.1	43.7	**34.8**	**32.7**	**32.2**	**32.3**	**31.1**	**27.5**
Reading and writing	87.7	88.1	**90.5**	90.2	89.0	85.5	**83.9**	86.9	85.6
Arts and crafts	80.0	81.6	80.4	77.4	78.4	**75.8**	76.6	**75.4**	**72.0**
Street arts, circus, festival or carnival	41.0	40.5	41.5	**46.4**	**46.5**	44.9	43.3	44.9	37.8
Film or video	49.0	48.6	**58.5**	**67.5**	**64.7**	**71.2**	**69.4**	**67.0**	**64.4**
Other media	26.8	28.0	28.3	**22.2**	23.1	**15.5**	**13.8**	**13.3**	**12.8**

Notes: Figures in bold represent a significant change since 2008/09

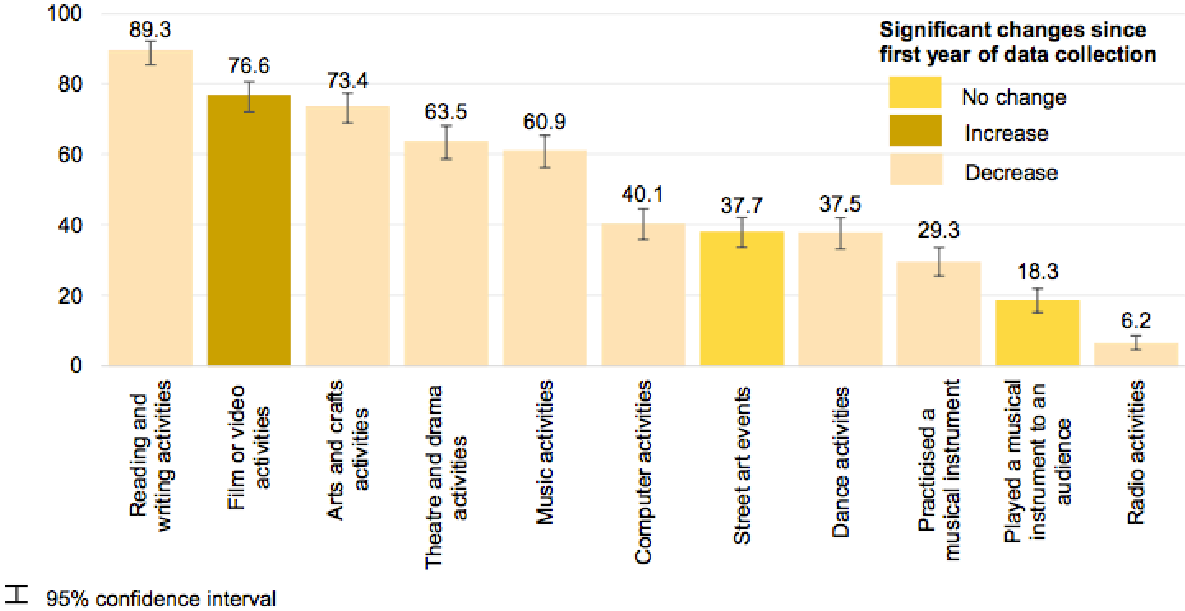
Source: (Department for Digital, Culture, Media and Sport, 2017c)

- The conclusions that can be drawn from Figures 63 and 64:
  - Reading and writing activities are the most popular arts activities for children aged 5-10;
  - Since 2008/09, there has been a significant increase in the proportion of children aged 5-10 who had participated in film or video activities, from 49.0% to 64.4% in 2016/17 (though there has been a steady decrease since 2013/14); and
  - Since 2008/09, there has been a significant decrease in in the proportion of children aged 5-10 who have participated in dance activities, music activities, theatre and drama activities, arts and crafts activities, and other media activities.
- These trends indicate a decrease in 5-10 year-olds engagement in 'traditional' artforms and an increase in 'newer' artforms associated with creative media. These trends suggest cultural preferences and behaviours among primary school aged children in England that are increasingly inclined towards creative media.

3.5.2. Overall rates of participation and/or attendance in arts activities, 11-15 year-olds

- Arts engagement for children aged 11-15 years old measured via the DCMS Child Taking Part Survey relates to both in and out of school activities.
- As with children aged 5-10, the most popular art activity for children aged 11-15 was reading and writing (89.3%). This represents a significant decrease from both 2008/09 (93.6%) and 2015/16 (93.5%).
- Figure 65 shows engagement by 11-15 year-olds either inside or outside school in the past year with various activities. Figure 66 shows engagement either inside or outside school in each activity year-on-year between 2008/09 to 2016/17

Figure 65: % of 11-15 year-olds that have engaged with each activity either inside or outside of school in the last 12 months, 2016/17



Source: (Department for Digital, Culture, Media and Sport, 2017b)

Figure 66: % of 11-15 year-olds that have engaged with each activity in the last 12 months, 2008/09 – 2016/17

	08/09	*09/10*	*10/11*	*11/12*	*12/13*	*13/14*	*14/15*	*15/16*	*16/17*
Dance	51.9	52.6	**45.4**	**45.2**	**43.3**	**37.6**	**36.0**	**35.9**	**37.5**
Music	72.4	70.9	71.0	**77.4**	73.3	73.6	69.0	70.3	**60.9**
Theatre and drama	69.4	69.5	67.2	**73.9**	69.7	71.5	68.8	65.0	**63.5**
Reading and writing	93.6	94.0	91.9	94.6	**95.7**	92.5	92.2	93.5	**89.3**
Arts and crafts	83.3	82.3	81.8	82.5	82.1	82.3	**77.9**	**76.6**	**73.4**
Street arts, circus, festival or carnival	35.8	35.3	38.3	**47.3**	**42.3**	**42.0**	39.5	40.1	37.7
Film or video	70.2	69.2	72.0	**83.5**	**83.8**	**83.6**	**81.7**	**81.3**	**76.6**
Radio	9.8	8.9	9.3	8.9	10.6	8.7	9.2	**6.3**	**6.2**
Computer based	70.8	74.5	**66.5**	**59.1**	**61.0**	**56.6**	**52.8**	**51.7**	**40.1**

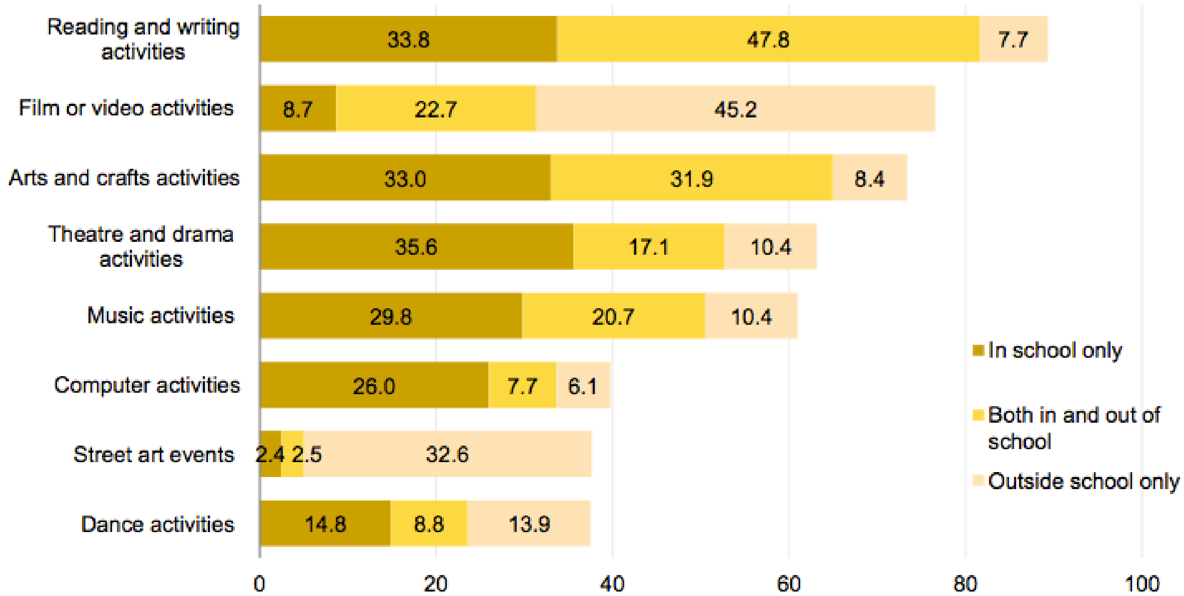
Note: Figures in bold represent a significant change since 2008/09

Source: (Department for Digital, Culture, Media and Sport, 2017c)

- The conclusions that can be drawn from Figures 65 and 66:
  - Participation in film or video activities in the last 12 months has significantly increased from 70.2% in 2008/09 to 76.6% in 2016/17 (though there has been a steady decrease since 2012/13);
  - Participation in dance activities, arts and crafts activities, radio activities and computer activities have decreased between 2008/09 and 2016/17;
  - There have been no changes in rates of engagement in music, theatre and drama activities, reading and writing activities, and combined arts (street arts, circus, festival and carnival arts); and

  - As per the findings for 5-10 year-olds, the data indicate a decrease in 11-15 year-olds' engagement in 'traditional' art-forms and an increase in 'newer' art-forms associated with creative media. These trends cultural preferences and behaviours among Secondary School aged children in England that are increasingly inclined towards creative media.
- Figure 67 shows that the most popular activities among Secondary School aged children in England in 2016/17 were reading and writing activities, film and video activities and arts and crafts activities.

Figure 67: % of 11-15 year-olds engaging in arts activities in school and out of school, 2016/17



Source: (Department for Digital, Culture, Media and Sport, 2017b)

- Consilium (2014) found higher levels of arts participation by girls than boys across both age bands (5-10 and 11-15) in its analysis of the 2012/13 child survey.

Figure 68: % children aged 5-10 who engaged with individual artforms outside of school in the last 12 months, by sex

	Males	*Females*
Dance	15.9	43.3
Music	31.4	41.6
Theatre and drama	27.3	38.4
Reading and writing	87.6	90.5
Arts and crafts	72.2	84.4
Street arts, circus, festival or carnival	45.9	47.2
Film or video	66.1	63.2
Any media	20.2	26.1
Visited library	66.5	72.4
Visited museum	62.4	64.1

Source: Consilium, 2014

Figure 69: % children and young people ages 11-15 who engaged with individual artforms outside of school, by sex

	Males	*Females*
Dance	9.6	36.5
Music	37.2	49.7
Theatre and drama	24.3	36.1
Reading and writing	61.5	72.6
Arts and crafts	33.6	53.7
Street arts, circus, festival or carnival	37.3	41.2
Film or video	74.2	77.5
Any media	27.6	21.8
Visited library	45.7	56.4
Visited museum	41.1	45.5

Source: Consilium, 2014

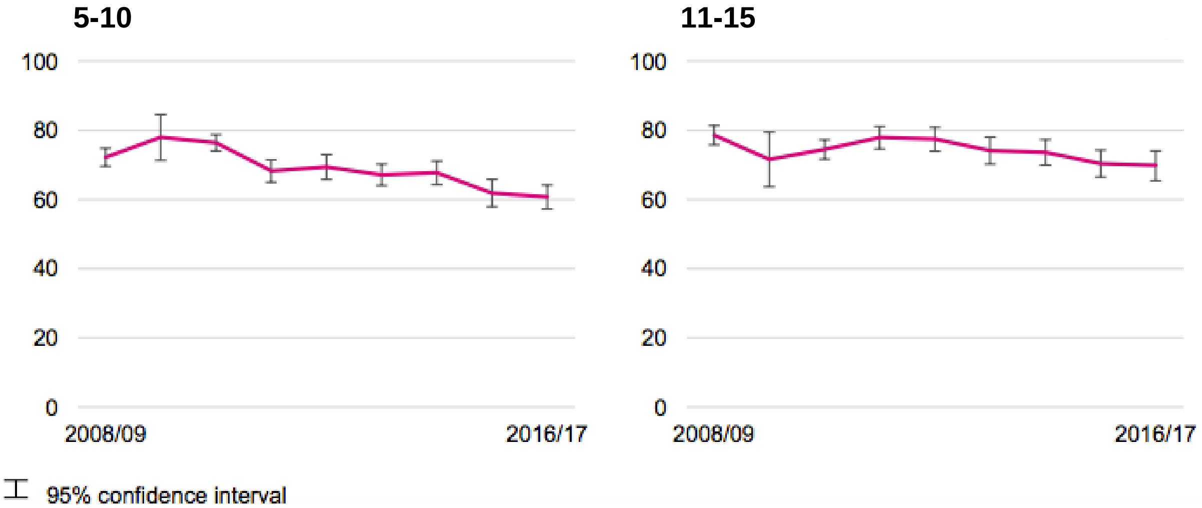
3.5.3. Visits to museums and galleries

- In 2016/17, 63.3% of children and young people aged 5-15 years old had visited a museum or gallery in the last 12 months, with relatively similar numbers among younger and older age-groups (63.0% of 5-10 year-olds and 63.7% of 11-15 year-olds). This is a statistically similar amount to the number of children reported for 2008/09 (63.2%) (Department for Digital, Culture, Media and Sport, 2017b).
- The proportion of children aged 5-15 years old who had visited a museum or gallery in the week prior to the interview also remained stable between 2008/09 (3.9%) and 2016/17 (4.0%).
- A difference could be seen in 2016/17 between age-groups visiting museums and galleries outside school hours, with 63.0% of children aged 5-10 as compared to 47.6% of 11-15 year-olds. Visits among 11-15 year-olds was even lower during school time, however, at 24.1%.
- A survey of 1664 children and young people aged 11-25 for A New Direction (Bunting, 2013), found that cultural participation is higher in London than the rest of the country. For example the survey found that 86% of 11-15 year olds living in London had visited a museum or gallery in the past year – 28.4 pp higher than the national level for this age-group in the same year, at 57.6% (Department for Digital, Culture, Media and Sport, 2017b).

3.5.4. Visits to libraries

- In 2016/17, 64.7% of children (aged 5-15) had visited a library in the last 12 months. This was a significant decrease from 75.3% in 2008/09 and 65.6% in 2015/16.
- Figure 70 shows a decrease in library visits between 2008/09 to 2015/16 among both 5-10 year-olds and 11-15 year-olds.

Figure 70: % of children that had visited a library in the last 12 months, by age group, 2008/09 – 2016/17



Source: (Department for Digital, Culture, Media and Sport, 2017b)

3.5.5. Trends in young people studying arts subjects or taking steps towards careers in the arts

- Even in schools with a high provision of arts and cultural activities, more 'traditional' subjects such as Maths and English are given higher priority – particularly for achieving positive Ofsted results (Watts & Oliver, 2015).
- The most recent Department for Education (2018) data has analysed the percentage of students entering at least one arts subject in 2017. The percentage of pupils entering at least one arts subject decreased between 2016 and 2017, by 1.5 pp to 46.5% of pupils in state-funded schools. Since 2010, there have been small fluctuations in the percentage of students entering at least one arts-based subject, as shown in Figure 71.

Figure 71: Percentage of pupils entered for at least one arts subject [9]

England, 2010-2017

	2010 final	2011 final	2012 final	2013 final	2014 final	2015 final	**2016 revised**	**2016 final**	**2017 revised**
Pupils entered for at least one arts subject	47.2%	45.8%	44.7%	44.8%	48.3%	49.6%	**48.0%**	**48.0%**	**46.5%**

Source: Department for Education, 2018

- A briefing from the Innovation Unit in May 2018 explored the fact that two reports published in 2017 attempted to show that the introduction of the EBacc did not negatively impact on arts GCSE uptake. These reports were published by the Department for Education-funded New Schools Network (2017) and the Department for Education itself (2017c). The Department for Education (2017c) claimed that this

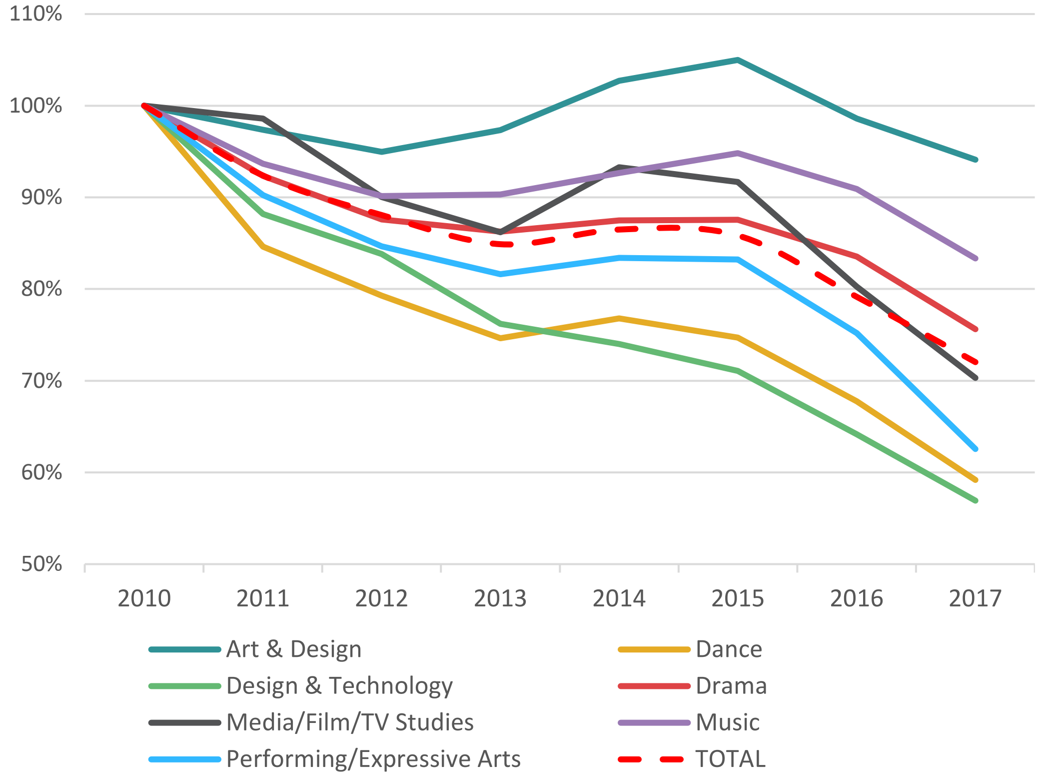
[9] For the purposes of the DfE figures, arts subjects included Applied Art and Design, Art and Design, Drama, Media/Film/TV, Music, Dance and Performing Arts. The figures include GCSEs, level 1/2 certificates, and AS-levels.

"puts to rest" concerns that the EBacc would stifle cultural education. The reports were criticised by groups, including the Education Policy Institute. Alternative analyses found that the proportion of GCSE entries into arts subjects had dropped since the introduction of the EBacc. The Department for Education (2017c) acknowledged that this was a "different" interpretation of the data.

- The New Schools Network (NSN) (2017) explored the impact of educational reforms on the study of arts GCSEs in English state-funded mainstream schools between 2011/12 and 2015/16, focusing on the EBacc, as well as Progress 8 and Attainment 8. After analysing GCSE data for each academic year since 2011/12, the report concludes that they have had no discernible impact on the popularity of the arts at GCSE, with the total number of GCSE arts qualifications being taken in 2015/16 having gone up: between 2011/12 and 2015/16, GCSE entries in arts subjects rose by 2%. Similarly, the average number of arts GCSEs studied by each pupil has increased by 7.4%, with 48% of students taking at least one arts GCSE in 2015/16.
- Moreover, between 2010/11 and 2015/16, 53% of schools have seen an increase in the proportion entering at least one arts subject, while 47% have seen no change or a decrease. The Department for Education report (2017c) report states that *"there is little correlation between the change in EBacc entry and the change in arts uptake in state-funded mainstream schools. Moreover, the small correlation that exists is positive, suggesting that schools where EBacc entry has increased tend to have also seen an increase in their arts uptake."*
- The Department for Education's (2017c) report compared a selected group of schools with the largest increase in EBacc entries since 2010/11 (the year EBacc was introduced), and all other state-funded mainstream schools. The selected group is defined as those schools whose EBacc entry rate has increased by 40 pp or more between 2010/11 and 2015/16, and includes 297 out of a total of 2,668 schools.
- However, the Cultural Learning Alliance (Cultural Learning Alliance, 2017) found that the number in England had in fact decreased by 28.0% between 2010 and 2017, and 9.0% since 2016.[10]
- And the Joint Council of Qualifications (JCQ) (2017) found that 26,800 fewer students took art, design and technology GCSEs in 2017 compared to 2016.
- There was a particularly large decline in the number of pupils taking Design and Technology, Dance and Performing/Expressive Arts (which fell by 43.0%, 41.0% and 37.0% respectively).

[10] The Joint Council for Qualifications (whose data was used in the Cultural Learning Alliance report) amalgamated numbers for Dance GCSE within PE; these numbers are therefore taken from the AQA exam board, and represent the UK rather than England specifically.

Figure 72: Decline in arts GCSE entries as percentage of 2010 figures



Source: Cultural Learning Alliance (2017)

- The New Schools Network (2017) research also looked at attainment in arts GCSEs in those schools where an above average number of students obtained the EBacc and concluded that there is a strong correlation between high performance in the EBacc subjects and high performance in the arts. In schools where EBacc attainment was above average in 2015/16, 73.2% of all arts GCSE entrants achieved A* – C, compared to a national average of 71.7%. A similar pattern was evident in schools that achieved above average Progress 8 and Attainment 8 scores in 2015/16.
- Analysis by Schools Week (2017) found that pupils were being "pushed" into EBacc subjects from creative subjects, which is leading to less exam success in EBacc exam entries.
- A critique of the New Schools Network analysis was published by Arts Professional (Romer, 2017), which claimed that:
    - Arts GCSEs as a proportion of all GCSEs fell from 7.6% in 2011/12 to 6.8% in 2015/16;
    - Entries for non-arts GCSEs rose by 15.7% between 2011/12 and 2015/16, while entries for arts GCSEs rose by just 2%;
    - Arts GCSE entries per school fell from 106 in 2011/12 to 103.1 in 2015/16;
    - The average number of non-arts GCSE entries per pupil rose by 20%, from 7.0 in 2011/12 to 8.4 in 2015/16, while the average number of arts GCSEs studied by each pupil has remained at 0.6; and
    - Entries for nine out of the 15 subjects designated as arts subjects fell between 2011/12 and 2015/16.

- This critique uses the same data as the Department for Education (2017c) report, but places the rise of arts subjects in the context of the uptake of all GCSE subjects, whereas the Department for Education report does not.
- The OFQUAL (2018) entries for GCSE, AS and A-Level statistics also show the arts subjects in context. This reveals that, since 2014, arts subjects have seen a 25.6% fall in GCSE entries, while over the same period, total GCSE entries have grown by 3.4%.
- The New Schools Network research excluded design and technology (D&T) from its analysis, partly on the grounds that it is not defined as an 'arts' subject in the National Curriculum, with this exclusion being criticised by the Creative Industries Federation.
- Research commissioned by the National Union of Teachers (NUT) and conducted by King's College London (Neumann, Towers, Gewirtz, & Maguire, 2016) surveyed 1,800 NUT members and undertook three case studies in London secondary schools. The report claimed that the majority of teachers feel that non-EBacc subjects are being squeezed and put under pressure around teacher resources and time, and curriculum time.
- This survey found that, after the introduction of EBacc:
    - 75% of teachers reported that students now had fewer GCSE subjects to choose from in their schools;
    - 82% said that exam entries in creative subjects had fallen;
    - 72% of non-EBacc teachers said they had fewer students, compared to 3% of English and Maths teachers;
    - 77% of non-EBacc teachers 'disagreed a lot' with the statement that the reforms have increased their job security.
- Indeed, Department for Education statistics (Arts Teaching, 2016) show that between 2010 and 2016, the number of hours the arts were taught in secondary schools fell by 17% and the number of arts teachers fell by 16%.
- Thomson et al (forthcoming) have found that, following EBacc change, curriculum needs and time constraints have led to some schools reducing emphasis and time-tabling of 'second class subjects' (including the arts) to focus on the 'subjects that matter'. Some schools have cut certain arts subjects altogether.
- Students told Thomson et al that peers, family and teachers believe that arts subjects are "easy", "unimportant" and do not require a lot of work. *"They experienced this view as a dismissal of the arts, and of them, and the assertion of a subject and social hierarchy which was unjustified, and inaccurate."* Both students and teachers in this research recognised the need for a balanced approach to arts and STEM subjects in their education.
- The arts subject data shows significant decreases in both hours taught and number of teachers across arts subjects and key stages (with the exception of media studies in KS3), as shown below:

Figure 73: Decline in hours taught and number of teachers, 2010-2016

	Change in Hours Taught 2010-2016				Change in Teachers 2010-2016			
	KS3	KS4	KS5	All Secondary	KS3	KS4	KS5	All Secondary
Music	-9.3%	-5.8%	-17.8%	-9.8%	-11.3%	-7.5%	-16.1%	-10.7%
Drama	-3.5%	-23.5%	-21.6%	-12.7%	-10.9%	-18.8%	-18.4%	-17.1%
Art & Design	-10.9%	-20.5%	-14.8%	-14.6%	-6.8%	-13.7%	-11.5%	-9.1%
Media studies	3.8%	-33.9%	-19.9%	-24.3%	11.1%	-32.6%	-20.0%	-27.1%
Combined Arts / Humanities / Social Studies	-76.1%	-75.0%	-25.0%	-72.4%	-70.0%	-50.0%	-50.0%	-61.5%

Source: Department for Education Arts Teaching School Workforce Census, Nov 2010-2016

Arts and culture training for primary/secondary teachers

- This decreasing number of teachers teaching arts subjects is reflected in the total number for FTE Regular Teachers in secondaries (Department for Education, 2017b), which dropped from 219,000 to 208,200 between 2010 and 2016 (-4.9%). While the percentage drops for arts subjects are much higher:
    - Music: -10.7%
    - Drama: -17.1%
    - Art & Design: -9.1%
    - Media Studies: -27.1%
    - Combined Arts / Humanities / Social Studies: -61.5%
- These data may in part reflect implications of bursaries attached to teacher training. The Get into Teaching website reveals that, while all other subjects have bursaries for their teacher training, Music has limited bursaries available that are dependent on degree classification (Department for Education, 2018, June 25). Similarly, Art and Drama have none. These training teachers are encouraged to apply for loans.
- The Times Educational Supplement shows no requirement that teachers must teach in the subject they trained in during their NQT year. Beyond subject knowledge required to teach the curriculum, there are no requirements for training in culture, creativity or the arts to receive Qualified Teacher Status, and no reference to creative or cultural teaching in the Teachers' Standards (Times Educational Supplement, 2018, June 25)
- Teachers are assessed against teaching standards, and according to the Department for Education Teachers' Standards (2011), the majority of these standards relate to teaching practice and being a good teacher, rather than subject knowledge.
- Qualitative research with a working primary school teacher indicated that teachers apply the national curriculum and design lessons to appropriately deliver this curriculum. The Arts Lead in a school may undertake audits of relevant work as part of their role to ensure that national curriculum needs are being met for that year group. If needs are not being met, then upskilling of staff may be required, or

new teaching methods for the subject may be devised. A teacher may also be trained in the arts as part of individual CPD, should those opportunities be available.

- The Department for Education indicates that, to become a qualified teacher in England, trainees typically complete a programme of Initial Teacher Training (ITT), which provides them with training, mentoring and teaching practice in schools, and leads to the award of Qualified Teacher Status (QTS) for successful trainees. Of the 28,396 final year postgraduate trainees in the 2015 to 2016 academic year, 91% were awarded Qualified Teacher Status (QTS).

Figure 74: Proportion of final year postgraduate trainees awarded QTS, and proportion in a teaching post within 6 months by subject (2015-2016 academic year)

Figure 5: Final year postgraduate trainees, proportion awarded QTS and proportion in a teaching post within 6 months by subject, 2015 to 2016 academic year

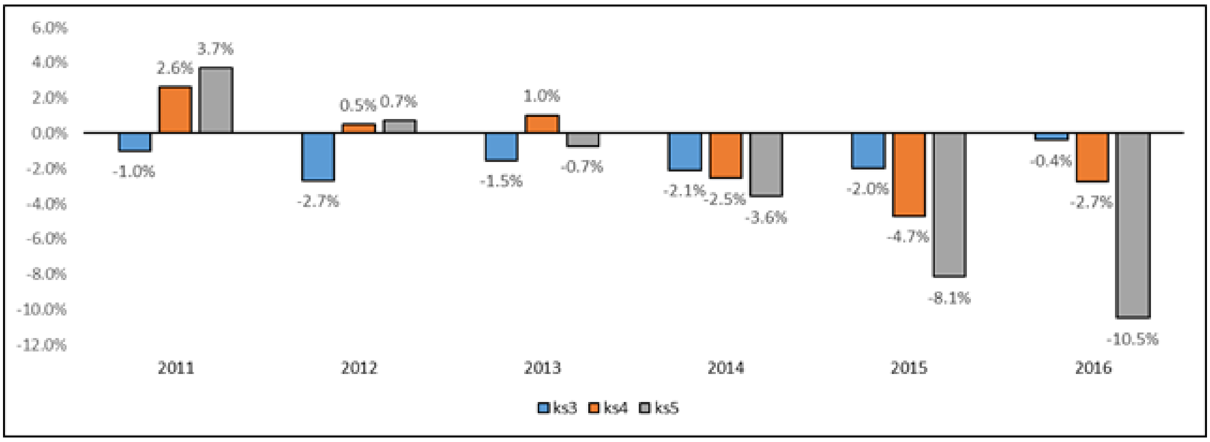
	Total final year trainees	Awarded QTS	In a teaching post[4]
All Primary and Secondary	28,396	91%	95%
Primary	12,817	91%	96%
Secondary	15,579	92%	94%
of which:			
Art & Design	492	95%	93%
Biology	1,064	90%	95%
Business Studies	198	x	91%
Chemistry	984	87%	93%
Classics	69	x	97%
Computing	507	84%	92%
Design & Technology	535	92%	95%
Drama	480	96%	96%
English	2,401	93%	97%
Geography	582	92%	97%
History	947	94%	95%
Mathematics	2,537	89%	92%
Modern & Ancient Languages	1,359	93%	92%
Music	372	95%	93%
Other	465	93%	92%
Physical Education	1,465	96%	94%
Physics	710	85%	91%
Religious Education	412	91%	96%

Source: Department for Education (2017b) *Initial teacher training performance profiles for the academic year*, 2015-2016

- Data from the Department for Education's Workforce Census show that hours spent teaching arts subjects at KS3 do, generally, seem to be holding up better than hours taught at KS4 and KS5. The rate of change has sped up over the past few years, as indicated in the graphs below, showing the year by year change in hours taught by key stage:

Figure 75a: Reduction in hours spent on arts subjects in KS3 & 4 (Music)

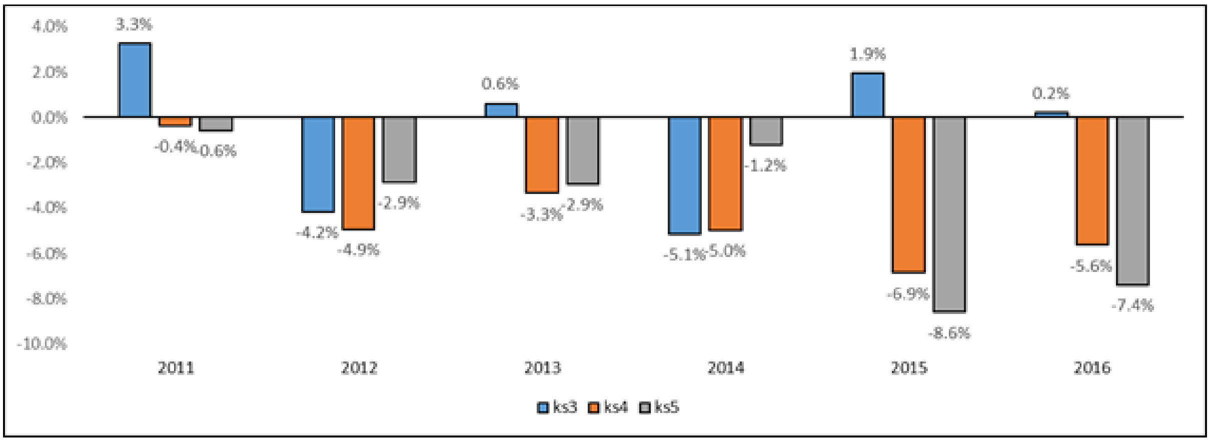
Music:



Source: Department for Education. (2017a) *Statistics: School Workforce Census*, Nov 2010-2016

Figure 75b: Reduction in hours spent on arts subjects in KS3 & 4 (Drama)

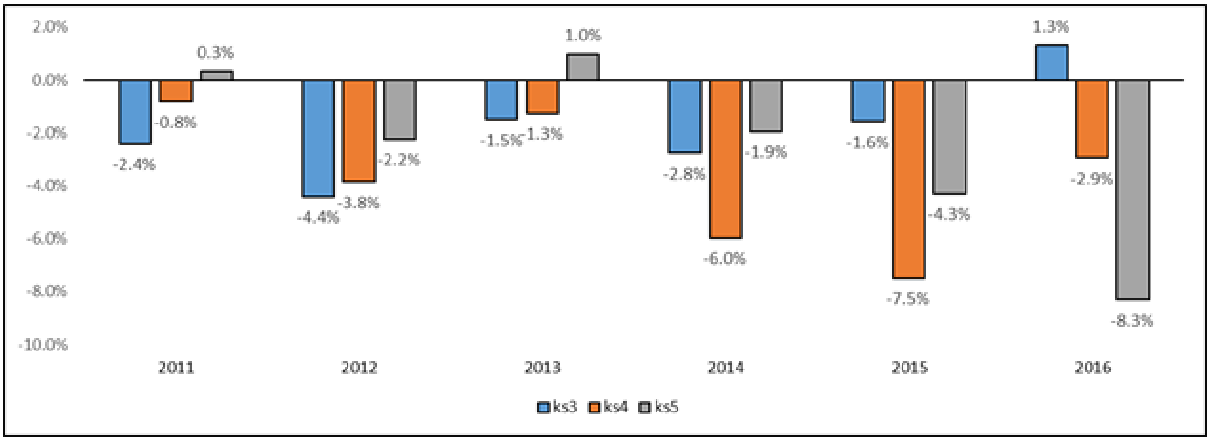
Drama:



Source: Department for Education. (2017a) *Statistics: School Workforce Census*, Nov 2010-2016

Figure 75c: Reduction in hours spent on arts subjects in KS3 & 4 (Art & Design)

Art & Design:



Source: Department for Education. (2017a) *Statistics: School Workforce Census*, Nov 2010-2016

- At Key Stage 4 level, the EPI (2017) found that the proportion of pupils taking at least one arts subject fell from 55.6% in 2010 to 53.5% in 2016.
- This naturally has implications for later stages of education, and UCAS (2017) found that 14,000 fewer students took creative subjects at university level in 2017 than in 2016.
- Academics from the University of Sussex surveyed 705 schools (657 state and 48 independent schools) in England, over a five-year period, and found that nearly 400 (393) state schools claim the EBacc is having a negative impact on the provision and uptake of Music within their own school and on the wider curriculum. The research also discovered that:
    - 3% of state school teachers surveyed reported that the EBacc had a positive impact on Music within their school;
    - Of all the schools surveyed, in 2016/17 Music was only compulsory for ‘all Year 9 students’ in 62 percent of schools, despite it being compulsory in the National Curriculum; and
    - The number of schools included in the survey that offer young people the chance to study BTEC Music Level 2 at Key Stage 4 declined from 166 in 2012/13 to 50 schools in 2016/17.
- The various claims and counter-claims about the impact of recent changes in education policy are based on different statistical conventions, differing statistical baselines, and different decisions about inclusions/exclusions of subjects within arts-based analysis.
- Thomson et al (forthcoming) found that students chose the arts not simply on account of what it might do for them in the future, but also for what it provided for them in the everyday. Students enjoy the agency of studying arts subjects, and the sense of wellbeing they find in developing work. They enjoy the classroom culture

and teaching style associated with arts – positioning the culture and work as particularly different from other subjects such as maths.

- Students often reported that their parents and friends were worried about the arts as a career choice. However, students pointed to the transferability of what they had learnt.
- In analysing the entries to arts subjects at Key Stage 4, the EPI (2017) found that the impact of attitudes of parents and pupils on arts provision varies between different schools. There were cases where the school's strong arts provision was regarded as effective in attracting prospective parents and pupils, whereas in others, there was a concern that parents and pupils did not place as much value on the arts as on core academic subjects. This was tentatively attributed to the possibility that their views had been shaped by the EBacc, and the fact that the arts subjects at Key Stage 5 are not considered to be 'facilitating' subjects by Russell Group universities.
- GCSE statistics show that girls are more likely to enter arts GCSEs and significantly more likely to get higher grades (A*-C) than boys. In 2013/4, boys made up 34% of GCSE entrants in art and design, 38% in drama and 30% in performing arts, despite making up 51% of entrants in any subject (Department for Education, 2015a).
- Etherington (2013) points out that girls are even more likely to take vocational courses in arts subjects (she cites Ofsted figures from 2009, that three in four of those taking vocational subjects are female). Boys are much less likely than girls to take an arts A Level alongside a science A Level which may relate to perceptions of the relevance of arts subjects to future employability. However, the gender split in entries for music, media, film, TV and English literature GCSE is much more even (see EW Group, 2016 analysis of Department for Education, 2015a; Gill, 2015).
- Across all subjects, 82% of boys and 89% of girls achieved A*-C grades in 2013/4, a 7 pp gap in terms of performance. In art and design (including applied art and design), media, film and TV and performing arts, this gap increases to 19 pp or more, suggesting the effect of gender is greater in arts-related subjects (EW Group (2016) analysis of Department for Education (2015a), for 2013/14).
- Taylor (2015) has undertaken analysis of gender take-up of arts GCSEs (using Department for Education statistics) between 1999 and 2014 and concludes that the picture is complicated and varies for different subjects. For example, boys' entries for music GCSE increased rapidly from the early 2000s, peaking in 2008 but declining since; there has been only a very slight increase and reduction in girls' entries in the subject during this period.
- Young women are more likely to take art and design and drama at A Level than young men. 7.6% of A Level entries in 2013/14 by young women were in art and design, compared to 3% of A Level entries by young men. Drama accounted for 2% of A Level entries by young women, compared to 1.1% of young men. However, music was more popular with males than females: 1.3% of A Level entries by young men in 2013/4 were in music, compared to 0.7% of female entries (Department for Education, 2015b).
- There is indicative evidence from Arts Award (2016) that participation in Arts Award increases young people's exposure to different art forms, increases the likelihood of them choosing to continue studying arts subjects and increases the likelihood that

they will consider a career in the arts. However, this study is based on a small sample of participants and does not include a control sample.

- The ArtsWork programme, designed to support Arts Award and ArtsMark, had a considerable positive impact on teachers' ability to deliver arts and cultural activities, leading both staff and students to become confident champions of the arts both within their own schools and those nearby. According to one principal, ArtsWork was responsible for training a cohort of *"arts ninjas"* in the *"spirit of revolution".* The programme was found to have given *"a high-value, high-impact learning experience"* for students at the participating schools and their partners – the majority of whom were in receipt of Pupil Premium (ArtsMedia People, 2016).
- The *Tracking Arts Learning and Engagement* project (forthcoming) found that students are interested in a range of arts, are enthusiastic audience members, and are creative in their spare time. Engagement promotes a sense of wellbeing and students are interested in learning about arts outside of school. Doing paid or voluntary work outside of work was not a barrier to arts engagement, in fact students who did work outside of school were more likely to engage.
- School has a significant impact on students' engagement with the arts; for a significant proportion of students (36%), school is where almost all their arts engagement takes place. This is the case for more girls (39%) than boys (31%), and for more younger than older students (37% of year 10s & 11s, 32% of year 12s & 13s).
- About a third of the students report that they often take part in arts activities with friends, but about the same amount disagree.

3.6. Barriers to the engagement of children and young people in arts and culture

3.6.1. Personal tastes, preferences and motivations

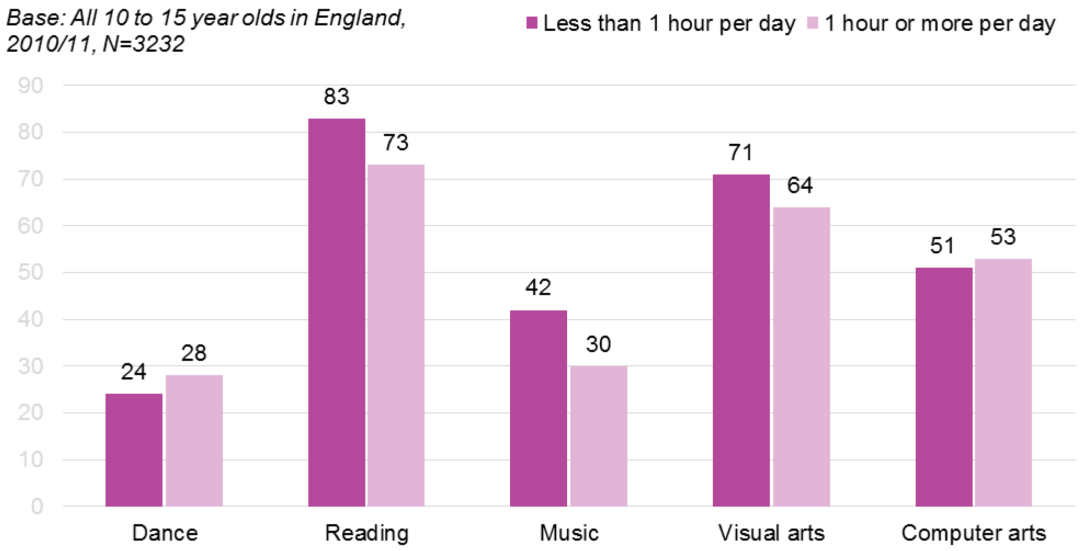
- A research discussion paper published on Tate's website (Sowton, 2014) provides an overview of key research, policy and practice around the motivation of young people to engage with arts and cultural experiences taking place within the galleries and museums sector. It identifies the following three theoretical understandings of motivation to engage: individualistic and altruistic; intrinsic and extrinsic (autonomous motivation); contingent and habitual. However, it also identifies a gap in recent research exploring gallery engagement and young peoples' motivation. Despite this, some motivations are discussed, through a review of recent UK and international literature:
    - A Norwegian exploration of barriers to engagement in music among children and young people (Tønnesvang, 2012) which identifies *"environmental factors (parental pressure) but also anxiety and the work involved in practising playing an instrument. Personal factors are described in relation to aesthetic feelings, abilities and beliefs while environmental factors focus on significant others involved in the process (parents, teachers, peers)."*
    - It also cites UK-based research (Tzibazi, 2013) in the museum sector which found that young people *"are indifferent to the offer made by cultural*

organisations, which may explain why the research suggests thirteen- to nineteen-year-olds are considered hard to reach. A number of barriers to participation are considered including cost, lack of motivation, parental influence, physical barriers, travel and lack of time, and the idea that art galleries are unwelcoming (uninviting) places."

- Sheffield Hallam's advanced statistical analysis of the Child Taking Part Survey (Shibli, Kokolakaki, & Davies, 2014) led to a set of conclusions about the role of tastes and preferences and the importance of stimulating demand for arts and culture. These findings reinforce the notion that people's tastes and preferences are fluid and can evolve over time. However, the study also finds that attempts to stimulate boys' participation in arts activities (and girls' participation in sport) will be more challenging because of their gender-specific tastes and preferences which seem to be determined at an early age.
- NatCen's analysis of the youth sample from Understanding Society (NatCen, 2017) looked at 10-15 year-olds' broader leisure and free time activities and how these related to their cultural participation and attendance. Increased participation in TV watching and social media use was associated with decreasing cultural participation. Increased involvement in domestic chores and more homework hours was associated with higher rates of cultural participation.
- While young people who were members of a social media website were no more or less likely than those who were not to do dance or computer arts activities, they were less likely to have:
    - Read a book for pleasure in the last month (77% vs 87%);
    - Played a musical instrument (36% vs 45%); or
    - Engaged in visual arts (66% vs 77%).
- As Figure 73 shows, those who spent an hour or more per day on social media were more likely than those who spent less to be dancers (28% vs 24%). This association may be explained by the fact that girls were both more likely to be dancers and more likely to spend time on social media. As Figure 73 shows, young people who spent less than an hour a day on social media were more likely to read, play a musical instrument, be involved in out of school music classes and engage in visual arts than those who spent an hour or more.
- There was also evidence that spending more time on social media was linked with giving up reading books. More time on social media at age 13/15 was associated with a higher chance that young people's participation in reading had lapsed since 2010/11. A third (33%) of those who spend an hour or more on social media at age 13/15 had stopped reading, compared with a fifth (22%) of those who spent less time on social media. There was no significant association between social media use and changes in other types of arts participation.
- Patterns of gaming were different for boys and girls, so NatCen analysed them separately for this activity. Boys who were gamers were:
    - Less likely to have been involved in dance (8% vs 12%); and
    - More likely to have been involved in computer arts (56% vs 46%).

- Among girls, gaming was associated with increased likelihood of reading, music, visual arts and computer arts activities, but not dance. These results might reflect the younger age of girls who were involved in gaming, but could also warrant further investigation.

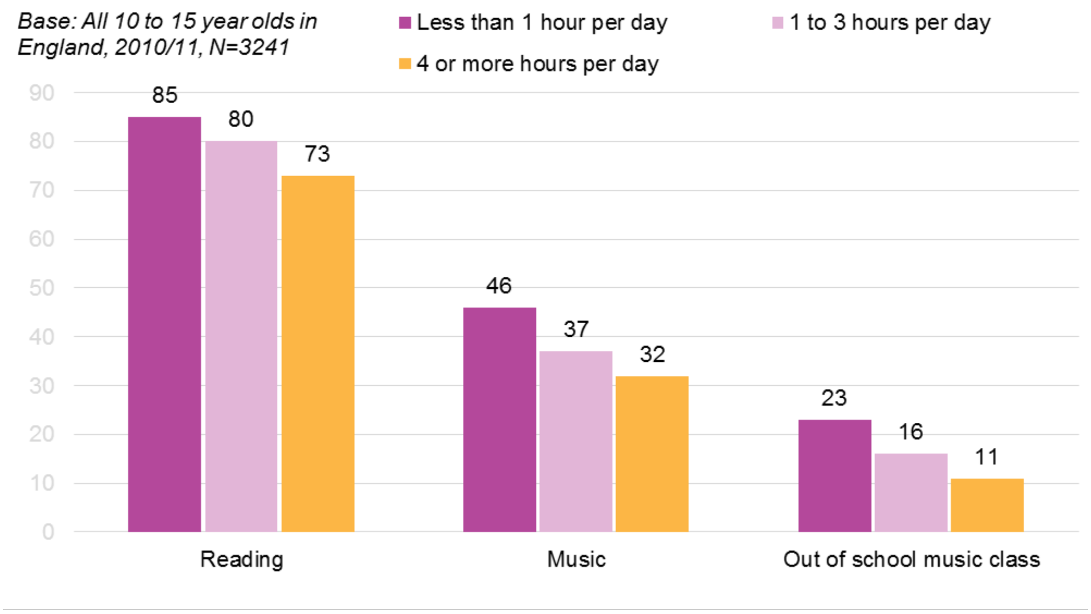
Figure 76: Arts participation by 10-15 year-olds in England by social media usage, 2010/11



Source: NatCen, 2017

- In common with findings from other research (Smyth, 2016), NatCen found that young people who spent less time watching TV were more likely to be involved in arts activities. The differences were pronounced for involvement in reading and playing a musical instrument (see Figure 74). An examination of changes in arts participation between ages 10-11 and 13-15 shows that reading was the arts activity most susceptible to decline among young people who watched the most TV:
  - Half (53%) of 10-11 year-olds who watched 4 or more hours of TV on a school day were readers at age 13/15, compared with almost three quarters (71%) of those who watched less TV; and
  - A third (35%) of the high TV viewers were lapsed readers, compared with a quarter (26%) of those who watched less.

Figure 77: Proportion of 10-15 year-olds who were readers, played a musical instrument and took out of school music classes by typical amount of weekday TV time, England 2010/11



Source: NatCen, 2017

- Overall, young people who did less than four hours of homework a week in 2010/11 were less likely to participate in:
    - Music (33% vs 40%);
    - Visual arts (62% vs 71%); and
    - Computer arts (48% vs 54%).
- There was a positive association between the amount of time spent on homework and reading for pleasure:
    - 70% of 10-15 year-olds spending less than 4 hours a week on homework were readers, as compared with 87% of those spending more than 8 hours a week;
    - 83% of those spending more than 8 hours a week on homework at age 13-15 were reading at that age, as compared with 43% of those spending less than 4 hours a week; and
    - 45% of those spending less than 4 hours per week on homework at age 13-15 were lapsed readers, as compared with just 16% of those spending more than 8 hours per week.
- Previous research found that young people who do household chores tend to be more culturally engaged (Rossman, 2014). NatCen's analysis confirmed this pattern, finding participation in several types of arts activity to be higher among 10-15 year-olds who helped out at home for at least an hour per week:
    - 84% were readers, as compared with 76% of those who spent less time helping out;

  - 72% engaged in visual arts, as compared with 66% of those who spent less time helping; and
  - 55% were engaged in computer arts, as compared with 50% of those who spent less time helping.
- A survey of 643 young people by Beatfreeks (2017) across a range of socio-economic groups, postcodes and other demographic characteristics living in Birmingham found that:
  - 39% were most influenced by family and friends and being part of a family was their top priority, above building a career;
  - Young people were most likely to identify themselves through their passions, although for some BAME young people, religion came before their passions;
  - It also found that the most popular form of cultural consumption is films (18%) and TV series (17%), although only 4% watch live TV. Consumption of memes and pics, streaming apps, vlogs and blogs all come above books (7%) and theatre and gigs (4%). Although the 'topic' (34%) is the most important criteria used when deciding what culture to consume, length is increasingly important for 16-24 year-olds, with shorter content preferred. This suggests a move from live events to digital, and from long to short form engagement, although the survey also emphasises that opportunities to engage in face-to-face cultural activities are valued because of the opportunity they provide to build social networks with like-minded people.

3.6.2. Perceptions of 'arts and culture' forms

- Some research suggests that definitions of arts and culture can be difficult when considering engagement by children and young people. Many young people, especially those from urban centres and diverse ethnic backgrounds, understand 'culture' in its broadest sense, incorporating cooking, fashion, street festivals and online activity as much as (if not more than) the definitions used by the Arts Council or DCMS (Bunting, 2013). This was also echoed by some interviewees during the EW Group (2016) qualitative research, who described how some young people drew few distinctions between traditional artforms, games, and online activity such as sharing photographs and videos. Some young people consider the traditional artforms more as hobbies than either potential professions within the creative industries or cultural practices (Bunting, 2013).
- Young people are less likely than older people to distinguish between 'arts and culture' and other activities in their leisure time by labelling some as one thing and some as another. Online sharing of photos, videos and writing, for instance, is not separated out into 'arts' (Flow Associates, 2011) and young people's digital, social, cultural activity and participation are increasingly interconnected (Manchester & Pett, 2015). Battersea Arts Centre and Contact Theatre's The Agency project, which uses methodologies rooted in participatory theatre to develop entrepreneurial skills and community projects, has been successful in engaging young men from BAME backgrounds, partly due to abandoning tightly bound definitions of arts and culture, and allowing' projects which include activities such as cooking as well as other cultural expressions.

- In their research report on understanding the value of arts and culture, Crossick & Kaszynska (2016) observe that cultural engagement in the UK and other countries is socially stratified, with involvement in arts and cultural activities differentiated by classic drivers of inequality such as class, status, gender, ethnicity or disability. Drawing heavily on the critical literature review on cultural value and inequality by O'Brien & Oakley (2015), they outline that inequality has multiple manifestations, seen not just in consumption of culture but also in relation to its production, namely employment and leadership in the cultural sector.
- This in turn can filter back and impact on how children and young people engage, with institutions appearing 'elite' as a result of the people working in them. In their report on the Circuit programme, the Paul Hamlyn Foundation and the Tate (2017) noted that *"During Circuit, young people have been explicit in their call for our galleries and museums to be more open, relevant and representative organisations with a more diverse workforce".*
- Representation is also argued to be a key factor in whether or not young people choose to engage with literature, with a forthcoming study stating that *"if there aren't enough [diverse] stories then we're losing readers and authors at quite a young age".* The issue is particularly starkly highlighted by one author interviewed:

  "If you're a young BAME person in Britain today, you have more chance of reading about a horse, a cat or a dog than you have of reading about a human that resembles you" (Bold, 2018).
- Manchester & Pett (2015) found that young people's understanding of culture is not always the same as that of organisations and institutions promoting arts and culture. They found that young people often have a broader definition of culture and cultural participation than standard definitions, and these can include 'home' cultures (e.g. music and cultural participation experienced in the home) and sharing their lived experience through social media and in particular digital photography as a means of artistic production and self-expression. However, they also found that definitions of culture varied by socio-economic group among young people. They found a division between young people in lower income and lower socio-economic groups defining culture through familiar cultural activities and 'belonging' while those in higher socio-economic groups define culture more through their 'future facing' aspirations, including experiencing high culture, such as great works of literature.
- BritainThinks (forthcoming) found that arts and culture is understood more as a series of distinct activities than a single concept by children and young people. Engagement with arts and culture is hindered by a perception that it is posh, traditional, distant and not really 'for' this age group, suggesting there is some scope for myth-busting here. Demographic factors have a major bearing on engagement in arts and culture, in particular gender, socio-economic grade, and age. Geography matters too, with local provision cited as a major barrier to taking part.
- BritainThinks looked into the relevance of different influencers, especially the role of school, peers (which increases with age), parents and celebrities (who have a relatively low level of influence). There is some appetite for further participation in arts and culture, but practical barriers remain a significant factor in whether or not children and young people engage with arts and culture – these include cost, time,

and the quality and availability of local provision (including in schools). Children and young people's relationship with the digital world presents a great opportunity to engage them further, with social media offering a potentially powerful platform for advertising what arts and culture can offer.

- Gibson & Edwards (2016) argue that young people in care often have reduced access to cultural activities of their choosing because the activities they would choose to participate in have lower social value for the 'corporate parents' responsible for enabling their participation in the arts. They also find that they can be prevented from engaging in arts and cultural activities they enjoy due to risk management processes (e.g. health and safety, photography and filming permissions etc.).

3.6.3. Wider family habits and behaviours

- Various research studies (e.g. Shibli, Kokolakaki, & Davies (2014) and NatCen (2017)) have evidenced intergenerational effects on cultural engagement and the importance of socio-economic status on cultural participation. Whether or not parents have a degree strongly influences children's weekly time spent on cultural activities (SQW Consulting, 2011). Children from higher socio-economic backgrounds are much more likely to play an instrument, receive individual tuition and take a music exam than those from lower socio-economic backgrounds and circumstances. Both of these factors are associated with continuing to play musical instruments. Children from different socio-economic groups also tend to play different instruments (ABRSM, 2014).
- Children and young people aged 10-15 are more likely to be culturally engaged if adults living in the same household (usually their parents) are culturally engaged. Adults own cultural engagement is often motivated by wanting to benefit their children: longitudinal analysis of the Taking Part Survey found that encouraging children's interests and learning is among the most frequently cited levers for increased arts attendance among adults (TNS BMRB, 2016). Sheffield Hallam's advanced analysis of the Child Taking Part Survey (Shibli, Kokolakaki, & Davies, 2014) linked child sample respondents with adult sample respondents living in the same household, and found that what adults took part in as children has a positive association with what their own children take part in now. Adults who went to the theatre or heritage sites whilst growing up are likely to have children who do the same (*ibid.*).
- Those who attend arts and museums more regularly are much more likely to have been taken to such events as children, or encouraged to participate. There are however, suggestions that certain protected groups are more likely to benefit from this influence than other children and young people. According to *Encourage children today for audiences tomorrow* (Oskala, Keaney, Chan, & Bunting, 2009), parents are significantly more likely to encourage and foster arts engagement among girls than boys. Parents who define themselves as black and minority ethnic and 'other' backgrounds are less likely to take their children to arts events or encourage participation. The strongest correlation, however, is with the socio-economic background and circumstances of parents. Parents from higher socio-economic groups are significantly more likely to take their children to arts events and to

encourage them to participate in arts activities, compared with parents from lower socioeconomic groups.

- For some children, a convergence of factors is associated with levels of arts engagement. Ethnicity, health, educational attainment and socio-economic status can interact with the role of parents to make arts and cultural engagement highly unlikely for some, as access to the arts becomes less controlled by school environments.
    - Rix et al (2017), in their study of reading habits among young people in foster care, found that instability of home-life had a profound impact on likelihood to read: the data suggested that reading proficiency was tied to length of foster placement, with foster parents who cared for children over a longer period spending more time on average reading together with them. This positive correlation between the reading habits of the carer and those of the child applied not only to time spent reading overall, but also in choice of reading material.
    - Socio-economic background also factored highly, with children and young people from lower socio-economic grades less likely to engage in formal activities or visit historic places. They are also less likely to use words like ‘drama’ or ‘concerts’ or define ‘arts and ‘culture’ without direction or suggestion (A New Direction, 2014).
    - Geography also proved to be a barrier, with a study by A New Direction (Bunting, 2013) demonstrating further layers of complexity. According to this study, cultural engagement in London is higher than recorded in the Taking Part survey, and is high across income groups and ethnicities for the 11-15 age group. However, those living in outer London – regardless of income or ethnicity – are less likely to have access to culture.
- NatCen’s (2017) analysis of the youth sample of the Understanding Society survey found patterns of cultural engagement associated with the household and family structure that children and young people live within. Previous research has shown some differences in cultural and sports participation for children from different types of households, such as lower participation in sports and museum visits among young people from single-parent households (Shibli, Kokolakaki, & Davies, 2014).
- There are some indications that placing activity in an ‘appropriate cultural framework’ is also especially important to non-white groups. For example, a study found that dance in an appropriate cultural framework was more successful in engaging BAME adults (Murrock & Gary (2010), cited in Arts Council England (2014)). This may extend to religion, where some evidence from Music Education Hubs (Sharp, 2015) suggests for example, that the role of music in religion can create challenges in engaging parents as it is not part of the cultural life of certain more devout Muslims. Similar factors may apply in visual arts. Finally, different patterns of digital use may have an impact. Black Caribbean 16-34 year-olds are, for instance, least likely to use Wi-Fi hotspots, which may restrict digital access (Ofcom, 2013).
- The Higher Education Standards Agency (2018) notes in its analysis of tracking data of undergraduate students of ethnicity by subject area that while 23% of the domiciled student population in the UK is BME, within creative arts and design

subjects only 15.1% of students are BME, lower than the BME student population average.

- Analysis of take-up of different subjects by ethnicities (Connor et al., 2013) found that the subjects most likely to be studied by white people were: veterinary sciences, agriculture, combined studies, history and philosophy, languages, physical sciences and creative arts and design. Conversely, the subjects most likely to be studied by BME students were medicine and dentistry, law, business, computer science, medicine related subjects, engineering and technology and social studies. While creative arts and design features in the top seven subjects studied by white students, it is towards the bottom of subjects taken up by BME students.

Ethnicity attainment gap

The ‘ethnicity attainment gap’ refers to the difference between the proportion of white UK-domiciled students who are awarded a 1st or 2:1 at degree level, and the proportion of UK-domiciled BME awarded the same degrees.

Whilst the issue of BME student attainment is complex and an attainment gap exists for all ethnic groups, it is consistently widest for Black (Black African/Black Caribbean/Other Black background) students across the HE sector. These statistics highlight the need for research into the Black student attainment gap, in order to more fully understand the specific challenges faced by Black students, and in order to avoid treating BME students as a homogeneous group (Miller, 2016).

The Equality Challenge Unit (2015) found that in 2013/14, the gap between the proportion of White and Black students awarded a 1st or 2:1 was 26.1pp compared to 15.2pp for all BME students. In addition, Black students are more likely to be mature students than other ethnic groups, and less likely to enter HE with A-Levels. The attainment gap for mature BME students has traditionally been higher than for young BME students.

3.6.4. Cost and affordability of arts and culture

- While there is no detailed body of literature about the relationship between cost and participation for children and young people specifically, A New Direction (Davies, 2014) found that clubs and groups play an important role in providing cultural engagement opportunities and socialising opportunities in young people’s spare time. However, they often come at a cost which may be beyond the means of some families, specifically differences in pocket money between Free School Meal (FSM) children and their better off peers which may prevent them from participating. A New Direction (Davies, 2014) also cites a skewed perception of the cost of arts activities across all young people surveyed which also presents a barrier.

- Bunting (2013) cites lack of money as a key barrier to participation for NEET young people and as a probable barrier to engagement with cultural venues in central London for those young people living in outer London boroughs.
- Beatfreeks (2017) explores barriers and motivations to participation in a survey of young people in Birmingham, the greatest of which is having enough money to get out or pay for entry (27%). There is a strong preference for regular activities (23%) vs one-offs (15%) and BeatFreeks associate this with the opportunity to evaluate value for money and quality of experience vs cost.

3.6.5. Availability and accessibility of arts and culture

- In *Cultural Capital?* (A New Direction, 2014), inequality of access to culture for children and young people in London is explored. Although combined engagement figures appear high, further analysis shows that those that are less well-off consistently have lower engagement when compared with their more advantaged peers. The differences are most significant in visiting exhibitions, music activities, visiting historic places and street arts, with an average difference across these examples of over 8 pp. The research, drawing on data from a survey of young people, also reveals that 35% of young people from lower-income backgrounds belong to a group/club, compared to 47% of more advantaged young people, indicating that many are not accessing the additional opportunities on offer.
- Bunting (2013) and Brook (2013) argue for proximity as a key feature of access. For Bunting this is also related to the distances that young people are able to travel alone and the cost of travel as key barriers to attendance for young people living in outer London.
- The disparity between arts and cultural engagement by disabled and non-disabled children and young people seems to be driven largely by in-school rather than out-of-school patterns. In 2015/16, children with a limiting illness or disability were less likely to have visited a museum or gallery in the last 12 months than children without a limiting illness or disability (54.5%, compared to 61.7% respectively). Special schools are less likely to visit cultural venues than mainstream schools (Lord, Sharp, Lee, Cooper, & Grayson, 2012).
- Barriers include:
    - Physical access, with 42% of venues in one study reporting that visually impaired people could access little of their collections (Shape Arts, 2013);
    - Accessible information about arts: nearly half of learning disabled young people rely on parents, carers or schools for information about events and activities (Mencap, 2009);
    - Poor level of accessibility on arts websites (including buying tickets for cultural events) (Consilium, 2014);
    - Transport – availability, accessibility, practicality and cost;
    - Support to attend arts (especially outside of school hours) (Mencap, 2009); and
    - Some learning-disabled young people prefer inclusive sessions but have concerns about harassment, and whether they would “fit in” or be welcome.

Making clear the level and pace of activity so people can judge whether it would be right for them is also important (Mencap, 2009).

- Interviewees from the sector that were engaged with as part of the EW Group's (2016) research into equality and diversity among children and young people, described challenges for arts and cultural organisations such as:
    - A lack of understanding of how best to adapt or make accessible their venues and programme to include disabled people;
    - A need for training in 'customer care' and disability awareness to increase service levels and confidence in working with disabled children and young people;
    - An inability to invest time and money into improving accessibility of websites; and
    - A lack of budgeting for access provision – as one interviewee put it, *"Until access provision is part of budgeting it won't make much of a difference knowing what to do"*.
- The same study also found that parental disability can impact on the whole family's ability to attend events, as well as making that family statistically more likely to be economically disadvantaged. One interviewee suggested that, *"if parents are disabled it is even more of a barrier. Arts Council England, when funding, should factor in travel costs"*.
- Green & Newsinger (2014) set out some case studies and quality principles for engaging disabled children and young people with arts and culture – however, it is not clear from the available evidence whether they have had any positive impacts either on the quality of engagement or on participation among disabled children and young people. In this regard, their report questions the efficacy of the Arts Council's Creative Case for Diversity, an initiative that seeks to promote diversity in artforms and talent, which they argue does not go far enough in giving specific policy which could act as a *"catalyst for innovation in arts practice"*, leaving inclusivity imperatives open to varied interpretation and implementation among organisations. They note that:

  "the vast majority of organisations … had no specific written policy towards disability and inclusivity. Instead, disability was one assumed element of written equal opportunities policy, where this existed at all".
- A New Direction (Little, 2014) has also highlighted barriers to participation in arts and culture for young carers. Bunting (2013) and Green & Newsinger (2014) also describe NEET young people as under-represented in audiences for cultural and arts activities. Bunting (2013) identifies the following specific barriers to participation for NEET young people:
    - Lack of school support;
    - Lack of money; and
    - Social isolation.
- Johansen & Glow (2012) argue that traditional forms of many art forms can be a barrier to participation for all children unless they are adapted or made more participatory:

“children are not natural audience members for most conventional western artforms, because the etiquette established in traditions of audience behaviour requires physical restraint or aural discipline that is either undesirable or impossible for children, and that such artforms do not provide a conducive environment for families.”

- The report on Circuit also found that young people are thoroughly suspicious of any organisations which seem to be approaching them in order to ‘tick a box’ (Paul Hamlyn Foundation & Tate, 2017). Clarity of intent from organisations running outreach programmes is therefore paramount to ensure that they do not inadvertently have a negative impact on engagement among the targeted group.

3.7. Expected changes and emerging factors that might influence engagement over the next 10 years: for adults

3.7.1. Digital arts and culture

- The Warwick Commission (2015) suggests that growth of digital and digital skill has significant implications for arts and culture production and participation in the future, with the role of young people being particularly important.
- The Department for Digital, Culture, Media and Sport launched its ‘Culture is Digital’ strategy in March 2018, which calls for greater collaboration between the cultural and digital sectors to increase audiences and meet audience expectations. It particularly points to digital technologies as a way to increase access to culture and ‘hook’ in new audiences. (Department for Digital, Culture, Media and Sport, 2018c)
- The DCMS report also cited Ofcom, Office for National Statistics (ONS) and Taking Part evidence to support its assertion that cultural engagement in the UK is changing. It states that the UK has an online audience of 50.4m people (Ofcom, 2017a), 76% of adults have a smartphone (Office for National Statistics, 2017) and 80% use the internet daily or almost daily (Department for Digital, Culture, Media and Sport, 2017d).
- AEA Consulting’s report into *Live-to-Digital Theatre* (2016) found that, among theatre audiences, younger survey respondents are more likely than older respondents to stream performances than attend theatre in person or in the cinema: 71% of respondents ages 16-24 have streamed; 55% of respondents ages 25-44 have streamed; and under 30% of those 45 and older have done so.
- It also finds that 68% of survey takers identifying as ‘Non-White British’ have streamed nearly twice the average (37%) for ‘White British’ respondents, and that 49% of those with household incomes of less than £20,000 have streamed.
- Live-to-Digital approaches may be a way to overcome some of the barriers to engagement with arts and cultural events such as time, cost and availability – all of these were less problematic relating to digital engagement than more traditional forms of engagement (AEA Consulting, 2016).
- However, research into Live-to-Digital theatre shows that digital experiences are not seen as a substitute for live performance, rather a new way to experience the arts.

  - Live-to-Digital is seen not as a replacement for live, but as a distinct experience by 66% or event cinema attenders and 77% of streamers that opens up ‘new ways of seeing theatre’ (72% and 75% respectively)
- Cooke et al (2015) explore the potential of digital engagement with museum collections. Their research found that engaging with digital artefacts can create renewed excitement about physical engagement with them. In addition, relationship building through social media can create a stronger and more interactive relationship between cultural institutions and their audiences. However, they also discuss some of the risks associated with interactive experiences with digital culture, including potential for institutions to lose trust and authenticity as well as the difficulty of creating truly interactive experiences.
- Findings from the Digital Culture Survey 2017 (MTM, 2017) showed that cultural organisations engaging in digital activities have seen recent increases in the impact of their digital work, including in boosting their public profile, reaching a wider audience, reaching a more diverse audience, connecting with new communities and reaching a younger audience. However, while in 2015 NPOs had greater confidence in digital activities and the skills of their organisation, their participation has declined since then, with only 8% now categorised as digital leaders, vs 10% in 2015.
- The DCMS report (2018c) and the Digital Culture Survey (MTM, 2017) both point to barriers in realising ambitions for digital technologies within the wider arts and culture sector and slow progression towards digital activities. Indeed, many activities relating to audience engagement decreased in use and prevalence amongst arts organisations between 2013 and 2017 (MTM, 2017).

3.7.2. Cultural democracy

- There are a number of reports and publications setting out the challenges for arts and culture in developing new ways of working which move from providing an offer and measuring participation to understanding the range of everyday cultural participation and facilitating people to develop their cultural capabilities (e.g. King’s College London, 2017; Miles & Gibson, 2016; Taylor, 2016; Warwick Commission, 2015).
- King’s College London (2017) propose new metrics for participation which look at ‘cultural capabilities’ and ‘cultural functionings’ to investigate cultural potential in the population and the degree to which this is realised, rather than purely looking at attendance and provision of culture.
- These new approaches may not necessarily have impact upon cultural institutions within the existing ecology, though. While impact reports from Hull (Culture, Place and Policy Institute, 2018) and Liverpool (Burghes & Thornton, 2017) suggest that participatory approaches to arts can increase participation where there is investment, the evidence is not yet clear as to whether participatory approaches overall will deliver greater audiences to the existing cultural offer.
- However, some templates have been developed which may bridge the gap between existing institutions and participatory arts organisations. For example, the Paul Hamlyn Fund’s *Our Museum* programme took museums on a process of structural

change so that they could become genuinely participatory institutions (Moriarty & Medlyn, 2016).

- BOP's *Analysis of theatre in England* (BOP Consulting, 2016) cited the increasing importance to many theatres of creating strong ties with their local communities, maximising their civic responsibilities and furthering ongoing engagement with their communities and audiences over short-term activities. Consultees largely felt the Arts Council didn't know enough about this side of their work.
- This increasing importance of deeper and longer-term engagement with the local community is also highlighted as a key strength in Ecorys (2017) evaluation of the Arts Council Creative People and Places programme. Their report states that *"the best examples of excellent art and community engagement come from CPPs that have consciously taken a holistic and multi-faceted approach to forge a mutually beneficial relationship between the arts and the community".* Ecorys (2017) and Consilium's (2016a) thematic research both stress the importance of the artists and arts organisations working with their communities to produce work that is relevant and of perceived quality to those experiencing (SDG Economic Development, 2017) it.
- Hadley and Belfiore (2018) argue that *"The practice of Audience Development should properly be considered as an ideological project situated within the wider cultural policy discourse of democratisation"*, noting that it has been long under-researched – despite the Creative Europe programme having identified it as "*one of the primary challenges for the future of the subsidised cultural sector"*.

3.7.3. Ageing population

- As seen in Figure 75, the percentage of the population that is 65 years or older is growing – from 14.1% of the population in 1975, to 17.8% in 2015 to a projected 24.6% in 2045. On the other hand, the proportion of children in the UK population has declined from 24.9% in 1975, to 18.8% in 2015 to a projected 17.7% in 2045. Life expectancy has also been increasing, girls born in 2015 can now expect to live 82.8 years from birth and boys 79.1 years.

Figure 78: Age distribution of the UK population, 1975 to 2045 (projected)

Year	UK Population	0 - 15 years (%)	16 - 64 years (%)	65+ years (%)
1975	56,226,000	24.9	61.0	14.1
1985	56,554,000	20.7	64.1	15.2
1995	58,025,000	20.7	63.4	15.8
2005	60,413,000	19.3	64.7	15.9
2015	65,110,000	18.8	63.3	17.8
2025	69,444,000	18.9	60.9	20.2
2035	73,044,000	18.1	58.3	23.6
2045	76,055,000	17.7	57.8	24.6

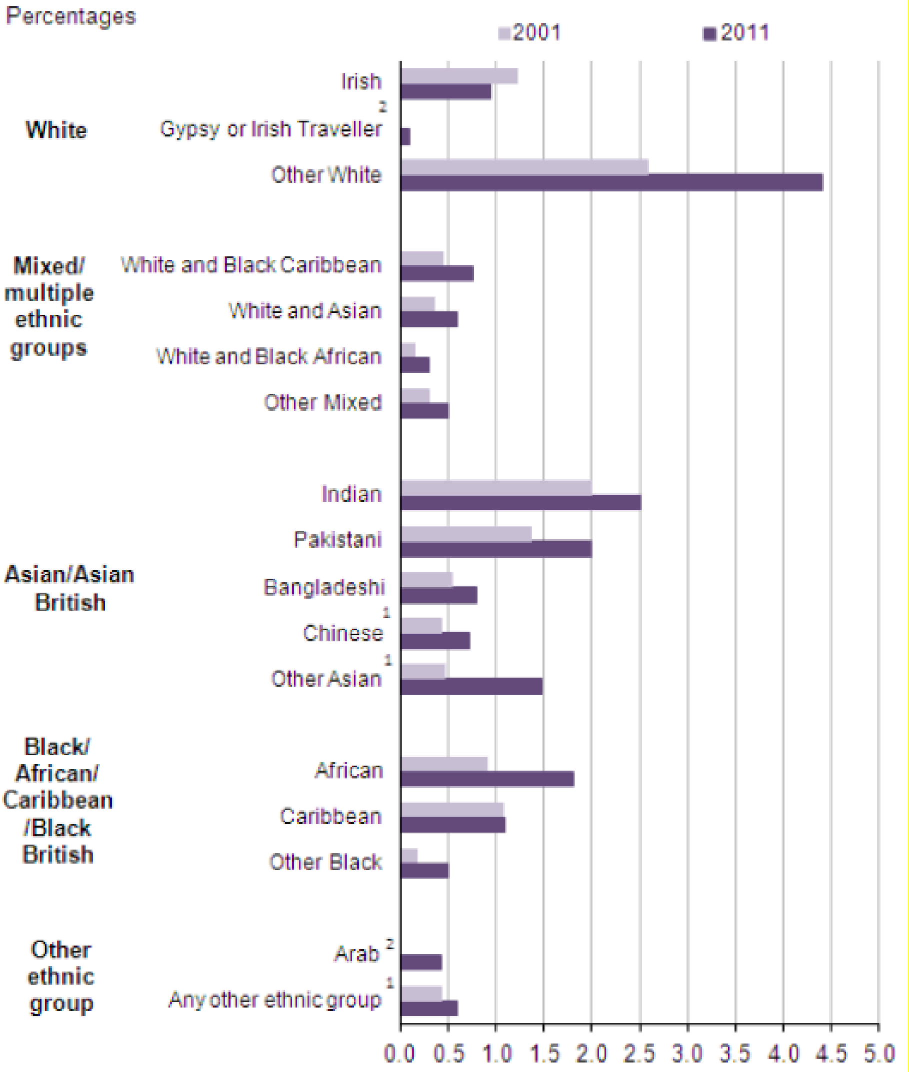
Source: ONS Overview of the UK population: March 2017

- There are a number of consequences of an ageing population, most notably the fact it may result in fewer people of working age to support those of pension age; in 2016 there were an estimated 308 people of pensionable age for every 1,000 people of a working age but this is projected to increase to 365 by 2037.
- In terms of arts and culture, an ageing population raises a number of potential issues:
    - Overall arts and cultural engagement amongst the oldest populations (75 years and over) is far lower than amongst younger populations. With an increasingly ageing population it will be necessary to better understand the particular barriers which are preventing older people from engaging.
    - There may be differences in the types of arts and culture enjoyed by different age groups. Analysis in this chapter shows that there are some notable differences in preferences by age group and it will be important to fully understand these differences as the older age group continues to increase.
- However, with research being done into the space for engagement with museums and galleries as a feature of dementia care – see Wilson (2018), for example – it is possible that an ageing population may prompt innovative collaborations between the arts and health sectors to provide a valuable offer for older audiences.

3.7.4. Increasing ethnic diversity

- Over the past decade England and Wales has become more ethnically diverse; although White British continued to be the majority ethnic group this has decreased from 87.5% of the population in 2001 to 80.5% in 2011. Figure 76 shows the changes in ethnic groups in England and Wales between 2001 and 2011 (excluding White British).
- Overall the 'Other White' category has had the largest increase between 2001 and 2011, this is likely to reflect the increased number of Polish and Eastern European people who entered England and Wales during this period. The Asian and Asian British ethnic group categories also had some of the largest increases with people identifying as Pakistani and Indian each increased by around 0.4 million.

Figure 79: Ethnic groups in England and Wales, 2001 and 2011[11]



Source: Office for National Statistics, 2012

- Going forward, a number of sources have predicted a growth in ethnic minority population in the coming decades. For example, the 2014 report by the Policy Exchange 'A Portrait of Modern Britain' estimated that people from ethnic minority backgrounds will make up nearly a third of the UK's population by 2050 (Sunak & Rajeswaran, 2014). Coleman (2010) stated that:

  "Given overall net immigration, total fertility, and mortality trends as assumed in the ONS 2008-based Principal Projection, the ethnic minority populations (including the 'Other White') would increase from 13% of the UK population in 2006 to 27 % by 2031 and to 43% by 2056…Alternative projections assume various lower levels of immigration. In the long run the growth of populations of increasingly complex mixed origins could make the definition and elaboration of ethnic groups as currently understood increasingly difficult, if not meaningless for a growing proportion of the future population."

[11] Please note that comparability issues exist for the following ethnic groups between 2001 and 2011: Gypsy or Irish Traveller; Chinese; Other Asian; Arab; Any other ethnic group.

- Although these predictions may be an overestimate, are based on relatively old population projections and can be nothing more than educated guesses given the unpredictability of population change, the overall trend for continued growth in the ethnic minority population seems likely to continue. Given the known differences in arts and cultural engagement by ethnic group (discussed above) it will be important to monitor trends in engagement by ethnic groups and preferences amongst different ethnic groups in order to ensure that the arts and cultural offer in England is suited to the needs and wants of these groups.

3.8. Expected changes and emerging factors that might influence engagement over the next 10 years: for children and young people

- In general, despite the fact that children aged 10 and under have a near universal engagement with culture, there is a trend of decreasing participation in arts and culture among children and young people.
    - This trend looks set to continue unless steps are taken to make arts and culture feel more relevant to children and young people.
- Although there is very little literature that directly addresses future trends in relation to children and young people's cultural participation, there is literature documenting:
    - Trends in social mobility;
    - Trends in diversity;
    - Trends in digital vs live participation in general and some evidence in relation to culture specifically;
    - Trends in the creative workforce; and
    - New definitions of culture and the implications for future participation in the arts and culture for children and young people in the next 10 years.

3.8.1. Trends in social mobility and inequality

- If the correlation between socio-economic group and participation in culture is maintained, it is possible to predict that lower social mobility will result in less of what is traditionally defined as cultural participation while greater social mobility over the next 10 years could result in greater participation in culture.
    - McGuinness (2018) predicts that income inequality will rise over the next 4-5 years.
    - The Boston Consulting Group & Sutton Trust (2017) predict that moderate gains in social mobility from increasing equality in educational attainment are likely be more than offset by a weak economic outlook and significant inequalities in access to education and job opportunities.

3.8.2. Trends in diversity

- The evidence shows that children from black and minority ethnic backgrounds are less likely to participate in a variety of arts and cultural activities (DCMS, 2017)
- The latest Census, in 2011, shows a long-term trend towards greater ethnic diversity in England and Wales. The white ethnic group accounted for 86.0% of the usual

resident population in 2011, a decrease from 91.3% in 2001 and 94.1% in 1991 (Office for National Statistics, 2012).

- The Equality and Human Rights Commission's analysis of the Labour Force Survey (Platt, 2009) found that in 2008 only 80% of children under 16 identified as White British, demonstrating that the younger demographic is ahead of the general population in terms of ethnic diversity.
- This evidence suggests that unless the nature of the cultural offer changes, or attitudes to the cultural offer change among minority ethnic groups, engagement will continue to decline.

3.8.3. Trends in digital vs live participation

- Young people are increasingly viewing short, on-demand and internet enabled content. Ofcom noted a decrease in live TV watching among young people aged 4-15 but an increase in unmatched viewing, which includes subscription video-on-demand like Netflix, apps on smart TVs, DVDs and gaming (Ofcom, 2017b).
    - Children aged 12-15 are more likely than in 2016 to say they regularly use a mobile phone (86% vs. 75%). This increase means that 12-15s are now more likely to say they regularly use a mobile phone than a TV set, unlike in 2016 when the numbers regularly using each device were similar (Ofcom, 2017b).
    - Young people are significantly more likely than older people to have streamed content. AEA (2016) found that, of the people they surveyed, 71% of respondents aged 16-24 have streamed (compared to under 30% of those 45 and over).
- Wilson et al (King's College London, 2017) and the Warwick Commission (2015) argue that children and young people have a head start in using digital media to develop their cultural capability. However, Wilson et al (King's College London, 2017) also argue that this will not happen unless they are facilitated by cultural organisations and state actors to value and express their everyday cultural creativity and see it as part of the wider cultural landscape.
- There is little evidence that digitally distributed cultural events attract new audiences who would not participate in live performances. A key challenge for arts and culture in the next 10 years will be to leverage the platforms increasingly used by children and young people to engage them in new artforms.
- Nesta (2018) predict that younger generations who are fully digitally immersed will expect 'novelty, choice and personalisation' from cultural experiences.

3.8.4. Trends in the creative workforce

- In 2016, Nesta predicted a more global marketplace for the creative industries, which presents opportunities and challenges for the sector. It also predicts that changes to cultural education and funding for creative subjects in higher education could make the UK less competitive and provide fewer creative professionals in the future (Nesta, 2016).
- Nesta identifies that creative jobs are among the least likely to be threatened by roboticization in the near future (Bakhshi, Frey, & Osborne, 2015), however it is not clear whether entry routes to the creative professions will have effectively widened

over the next 10 years and whether young people who do not have cultural capital will be able to access the jobs available in the creative sector.

3.8.5. New definitions of culture and the implications for future participation in the arts and culture for children and young people in the next 10 years

- The Warwick Commission (2015) and King’s College London (2017) both argue for the ‘democratisation’ of culture through a greater emphasis and value being placed by national agencies and cultural institutions on ‘everyday culture’.
- A New Direction (Little, 2014) and Wilson et al (King's College London, 2017) argue for a new, broader and transformed definition of participation in the arts and culture. In practice this means that arts and cultural participation should be encouraged in the forms in which young people wish to engage with it.
- Wilson et al (King's College London, 2017) also argue for a holistic rather than siloed understanding of culture, looking at the interrelatedness of everyday culture and ‘high’ culture and professional creative industries. This is one way that arts and culture can meet the needs, expectations and preferences of the diversity of communities in England through the established cultural offer.
- Brown et al (2011) argue that there is a trend towards active or participatory arts practices which has been stimulated by a variety of different factors including *“the sustained economic downturn that began in 2008, rising ticket prices, the pervasiveness of social media, the proliferation of digital content and rising expectations for self-guided, on-demand, customized experiences”*.
- In 2011, in response to declining numbers of Americans attending traditional cultural activities in its annual survey, the National Endowment for the Arts made the case for a broader definition of engagement with the arts, moving from attendance’ to ‘participation’ (Novak-Leonard & Brown, 2011):

  “‘arts participation’ has become a discourse more broadly accepted to imply multiple modes of engagement – including attendance, interactivity through the electronic media, arts learning, and arts creation – and a broader scope of contexts and settings”
- Howard (2017) argues that Arts Award when used in Youth Work settings could provide a vehicle for responding to individual preferences and empowering young people through their own chosen form of cultural expression, while also providing, through accreditation, a route to re-engage with education and a tangible outcome. This describes neatly one route to ‘interrelatedness’ between everyday culture and publicly funded culture, as mentioned in Wilson et al (2017).

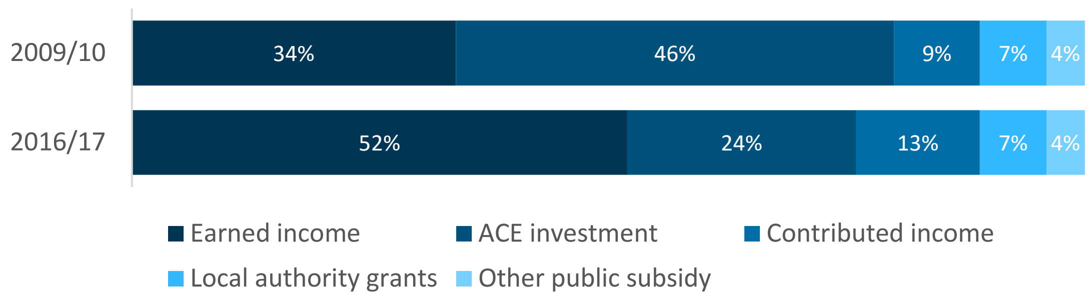
4. Resilience and sustainability of the arts, museums and libraries

4.1. Trends in income diversification in National Partner Organisations (NPOs) and the wider sector since 2010

4.1.1. Income diversification among NPOs

- The main sources of information about income diversification amongst NPOs are Arts Council England and Arts Council-funded reports.
- The Arts Council and the New Local Government Network (NLGN) found that the proportion of local government funding of NPOs had fallen by 27% in 2015, while overall revenue had increased by 17% (New Local Government Network, 2016). This suggests that NPOs have been relatively successful at income diversification. However, the report also acknowledges that smaller, local and non-NPO organisations may have been less successful in replacing lost revenue. MPMs had similar success to NPOs in generating additional income, despite flat or declining levels of local authority funding.
- Further to this, in evidence submitted to the Culture Media and Sport Select Committee (2016), the Arts Council stated that the NPOs have increased earned income by 25% in the last three years. In cash terms, between 2012/13 and 2015/16, the overall income of those 600 organisations rose to £1.75bn (an increase of more than 20%).
- The Arts Council's most recent NPO survey (which compares 2015/16 with 2016/17) demonstrates a continuation of this trend in the organisations which submitted responses both years: local authority grants have fallen by 9.9% (with 86% of organisations reporting a decrease), while earned income is up by 4.4% and overall revenue has increased by 2.7% (Arts Council England, 2018f).
- Although an inexact comparison due to difference in sample size and organisations reporting, there is nevertheless a sizeable shift in NPO revenue breakdown between 2009/10 and 2016/17:

Figure 80: NPO revenue breakdown 2009/10 vs. 2016/17



4.1.2. Income diversification among the wider sector [12]

- Despite high levels of innovation, Sir Peter Bazalgette notes that the Creative Industries are *"characterised by an abundance of SMEs, micro-businesses and individuals spread across the arts, design, cultural, digital, entertainment and media sectors"* – something which means *"they lack the capacity for strategic, cross-sectoral R&D which, if properly recognised and supported, could propel growth"* (Bazalgette, 2017).
- At the other end of the spectrum, Stephen Hetherington found in his analysis of financial diversification in the theatre industry that *"Companies perceived to be most prestigious and those able to exploit their productions extensively over time and distance are clearly able to earn higher levels of income, sponsorship and donations"* (Hetherington, 2015).
- The sources are in broad agreement that, while private investment in arts and culture is rising, it is not evenly distributed, with large arts organisations and London and the South East accounting for the majority of private investment.
- A survey of private investment in arts and culture (MTM, 2016) found that private investment accounted for 18% of arts and cultural organisations' total income in 2014/15, a growth of 21% primarily driven by high-value individual donations to the largest recipients.
    - London-based organisations account for 66% of total private investment, which is broadly in line with their share of total income (63%).
    - Individual giving remains the most important form of private investment, accounting for around half of all private investment in arts and culture, with individual donors favouring the largest organisations and those based in London.
    - However, museums (including art galleries with permanent collections) are not benefiting as much as other sectors, attracting just 9% of private investment in culture, a total of £41m per annum, compared to visual arts organisations (including art galleries without permanent collections), which account for 23% of private investment.
    - Museums benefit the most from individual giving (£19m), followed by trusts and foundations (£15m), and business investment (£7m).
    - Visual arts, music organisations and museums tend to receive more individual giving, while the majority of dance, theatre and literature organisations' income is derived from trusts and foundations.
    - Visual arts organisations and museums have grown their private income much faster than the rest of the sector, with literature organisations and theatres seeing low or stable private investment.
    - At the time of the survey, the sector expected further growth, with 57% expecting their total income to grow over the next three years. The sector felt particularly optimistic about growth in income from trusts and foundations and

[12] Data for income diversification trends data tend to focus on increasing financial investment and new revenue generation or trading models.

individuals, with more than 50% of survey respondents saying that they expect these income sources to grow over the next three years.

- The Culture, Media and Sport Committee's enquiry into the state of arts and culture outside of London (2016) received evidence from arts and culture organisations that despite their best efforts they are not able to diversify their funding fast enough to respond to the scale and pace of cuts.
- The Museums Association (2018) has found that museums are increasingly acting as cultural enterprises and seeking to increase their commercial income. Overall, 46% of museums responding to their survey said that their earned income had increased since 2015. About a third (32%) reported that it had stayed the same, with 19% experiencing a fall in earned income.
  - Respondents were also asked about their income from grants, donations and philanthropic giving (including all private donations and non-capital funding from the Heritage Lottery Fund). Overall, 80% of museums said that their income from these sources had either increased (42%) or stayed the same (38%).
- As a result, despite local authority funding cuts, 37% of museums said that their overall funds had increased in the past year, with just over a quarter (26%) saying that they had decreased, and 35% reporting that they had stayed the same.
- The Arts Impact Fund (2016) finds that there is a trend towards the development of cross-subsidy models within the arts and cultural sector, in which some commercial activity subsidises organisations' social and artistic impact. It also identifies features of success:
  - Using existing assets (e.g. buildings, intellectual property, people and their networks);
  - Grouping commercial activity within a separate legal entity, typically a trading subsidiary; and
  - Alignment of interests at management and trustee level.

4.2. Trends in local authority funding for arts and culture since 2010

4.2.1. Changes since 2010[13]

- Local authorities are the largest single source of revenue for the culture sector.[14] In 2015, the culture sector received £850 million from the Arts Council, and £1.1 billion from local authorities. (Culture, Media and Sport Committee, 2016)

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[13] Unless otherwise stated, figures are based on DCLG outturns (Department for Communities and Local Government, 2011-17).

[14] In the context of local government expenditure calculations, 'arts and culture' has been taken to include the following DCLG categories: arts development and support, museums and galleries, theatre and public entertainment, and libraries. Figures have been taken raw from successive DCLG outturns and not inflation adjusted unless specified otherwise. DCLG only gave regional breakdowns for 2009/10 outturn; regional trends have therefore been calculated by applying the same criteria to successive years. In terms of the selected data, we have understood '2010' to refer to the 2009/10 outturn. The ACE/NLGN report, however, uses data from 2010/11. The ACE/NLGN report's calculations are based

- However, there has been a continual downward trend in local government funding since 2010, constituting the largest reduction of any single funding stream for arts and culture. The greatest cuts in percentage terms have been to arts development, while libraries have suffered most in real terms.
- In 2008/09, the peak of local government funding, the amount invested per person was £9.59. By 2015/16, with adjustment for inflation, this had dropped by 39% to £5.87.[15] For comparison, Treasury funding to Arts Council England that year amounted to £5.26 per person (National Campaign for the Arts, 2017).
- The CMS Committee found that, across the evidence it received, *"arts and culture were viewed by some local authorities as the 'soft' areas which would be cut to continue to provide statutory services in the face of reductions to the overall local authority allocation"* (Culture, Media and Sport Committee, 2016). This is unsurprising given that the Local Government Association's "conservative" estimate places the funding gap for local authorities at £5.84bn by 2020 (Local Government Association, 2017).[16]
- Shire counties have reduced expenditure on arts and culture more any other class of local authority, spending with a 36.4% reduction between 2009/10 and 2016/17. Metropolitan districts, meanwhile, have reduced expenditure by 26.5% and London boroughs by 21.3%.
- 75% of the local authorities that funded arts and culture in 2009/10 had made cuts by the end of 2016/17.
- Overall, local authorities spent 26% less on arts and culture in 2016/17 than in 2009/10. The largest reductions were in the East Midlands and North East, both of which dropped by 36% over this period, while the lowest were in the South East (19%) and London (21%) (Department for Communities and Local Government, 2011-17).

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on net expenditure, leaving open the possibility of the funding picture becoming distorted due to income fluctuation. We have therefore chosen to use actual expenditure, and the calculations below are based on these numbers except where noted otherwise.

[15] The calculations made by Arts Index do not include expenditure on libraries.

[16] Several reports mention a funding gap of £16.5bn by 2020, but this is based on the LGA's 2012 projection (Local Government Association, 2013a).

Figure 81: Decline in local authority funding of arts and culture as % of 2009/10 expenditure, by category

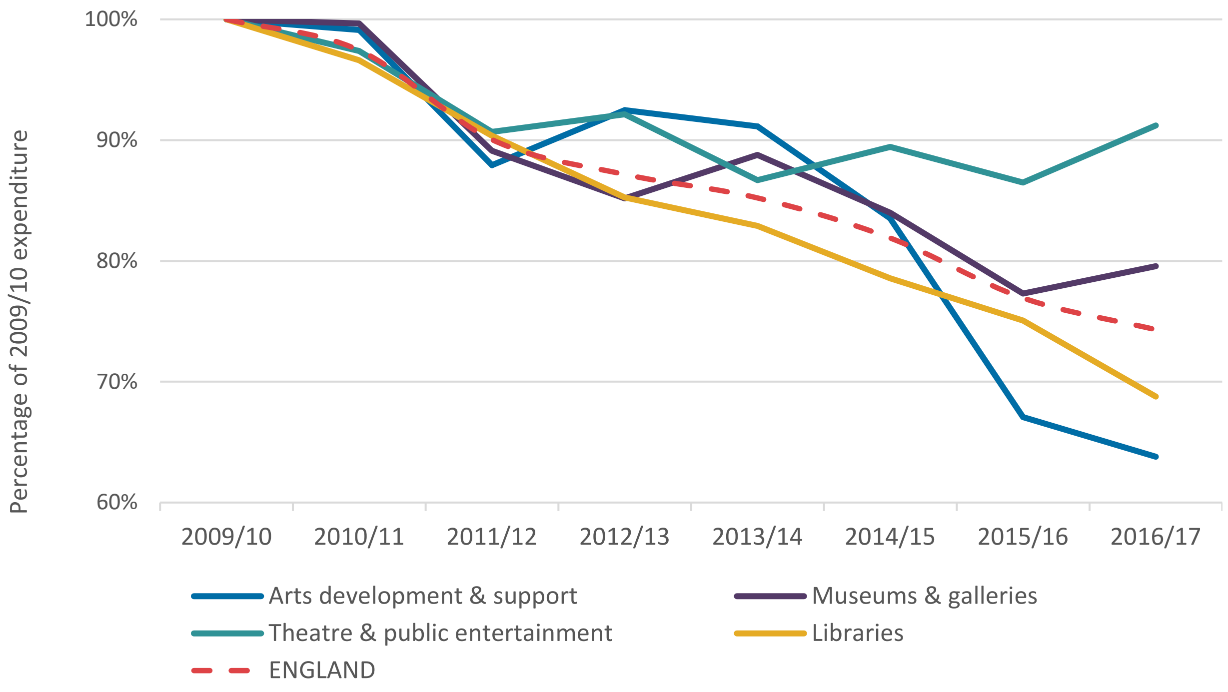


Figure 82: Local authority expenditure on arts and culture from 2009/10 to 2016/17, by category

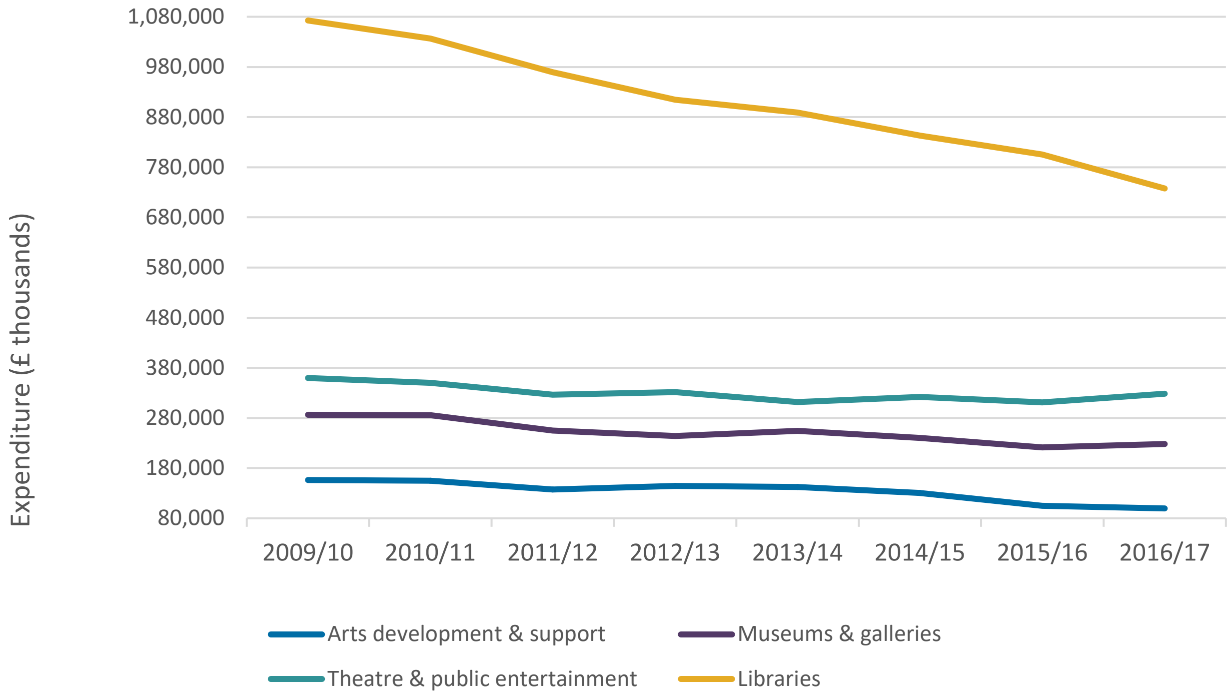


Figure 83: Decline in local authority funding of arts and culture as % of 2009/10 expenditure, by class

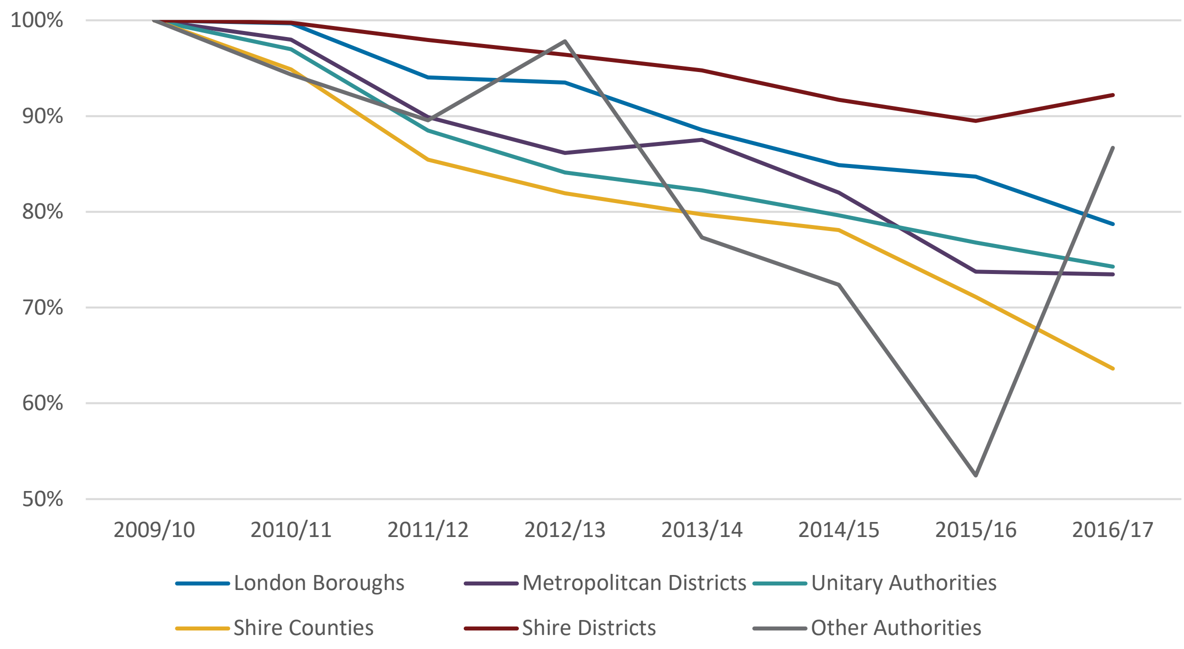


Figure 84: Local authority expenditure on arts and culture from 2009/10 to 2016/17, by class

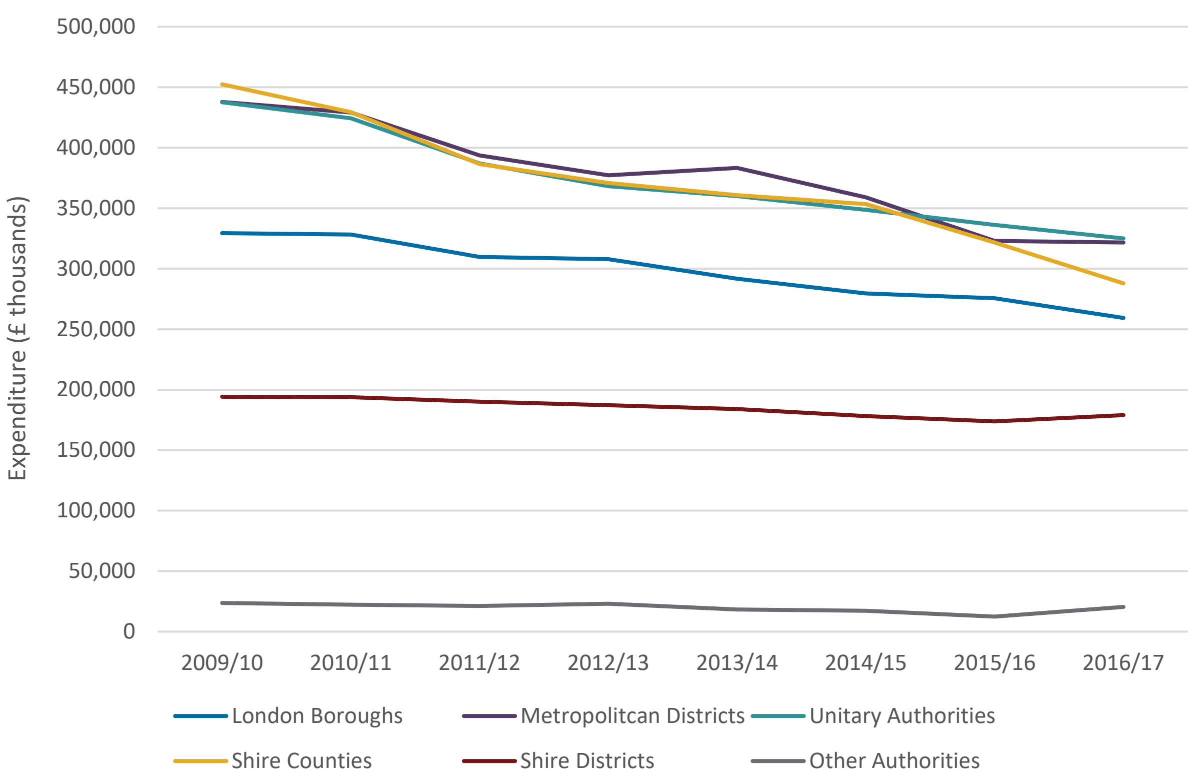
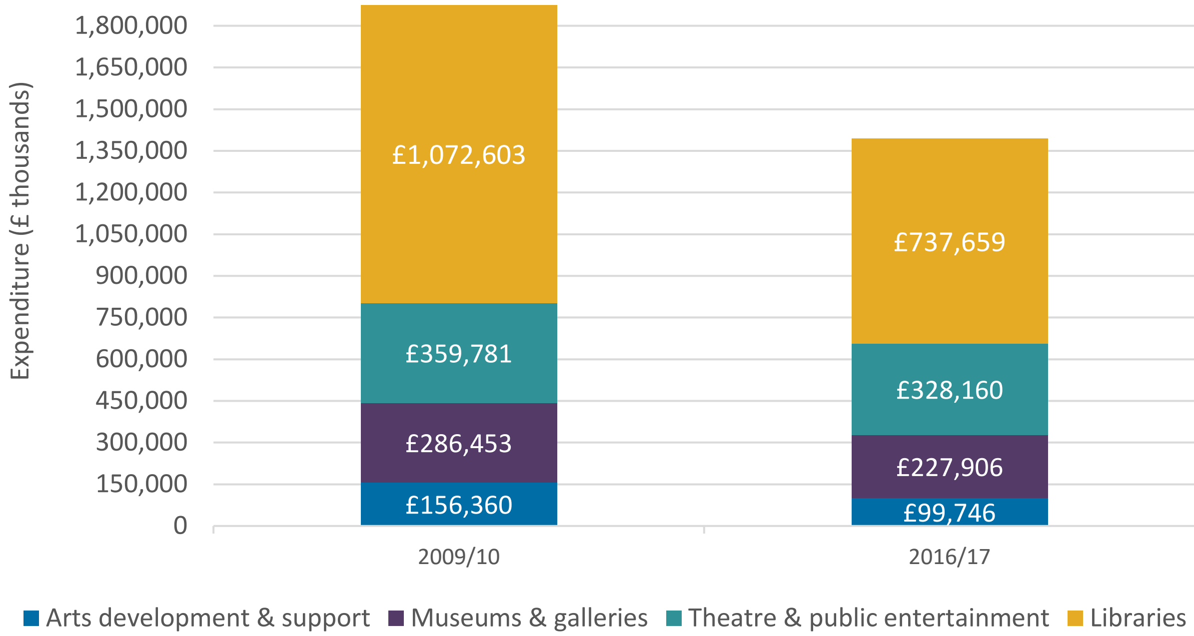


Figure 85: Comparison of total local authority expenditure on arts and culture, 2009/10 and 2016/17



- The following authorities have all reduced their expenditure on arts and culture to £0:

Figure 86: Spending over time of the 14 local authorities who have reduced their expenditure on arts and culture to £0 since 2009/10 [17]

(£ thousand)	09/10	10/11	11/12	12/13	13/14	14/15	15/16	16/17
Stratford-on-Avon	259	189	129	**0**				
Huntingdonshire	234	144	38	58	45	41	38	**0**
South Bucks	148	94	71	**0**				
Mendip	113	121	**0**		165	**0**		
Ashfield	87	108	48	46	45	**0**		
Richmondshire	66	**0**						
East Cambridgeshire	50	50	48	46	43	35	30	**0**
West Devon	44	45	20	47	57	11	**0**	
Forest of Dean	39	23	**0**					
South Staffordshire	35	4	2	1	**0**			

[17] Note that £0 expenditure does not necessarily denote a total cessation of support for arts and culture: support through the establishment of a trust, for instance, would not register on the DCLG outturn. There are no reports or collated data on this to show trends in establishment of trusts either by year or region, but the Chief Culture and Leisure Officers Association noted in evidence submitted to the CMS Committee that 79% of local authorities are working on ways of externalising service delivery through a trust across their remit (Chief Culture and Leisure Officers Association, 2016).

East Northamptonshire	26	34	4	**0**				
West Somerset	23	**0**						
Oadby & Wigston	22	16	**0**	3	**0**			
South Hams	12	12	13	**0**				

- Of these 14 local authorities, over a third are in the South West and a fifth in the East Midlands.
- However, there is a likelihood that at least some of these authorities have transitioned their arts and culture funding from direct grant-giving to trust status – possibly explaining why expenditure shows as 0 on some the above DCLG outturns. There are no reports or collated data on this to show trends in establishment of trusts either by year or region, but the Chief Culture and Leisure Officers Association noted in evidence submitted to the CMS Committee that 79% of local authorities are working on ways of externalising service delivery through a trust across their remit (Chief Culture and Leisure Officers Association, 2016).
- A further 11 local authorities have reduced their expenditure on arts and culture by over 90% (over 1/4 of which are in the South East, and nearly 1/5 are in each of the East Midlands, East of England and South West:

Figure 87: Spending over time of the 11 local authorities who have reduced their expenditure on arts and culture by over 90% since 2009/10

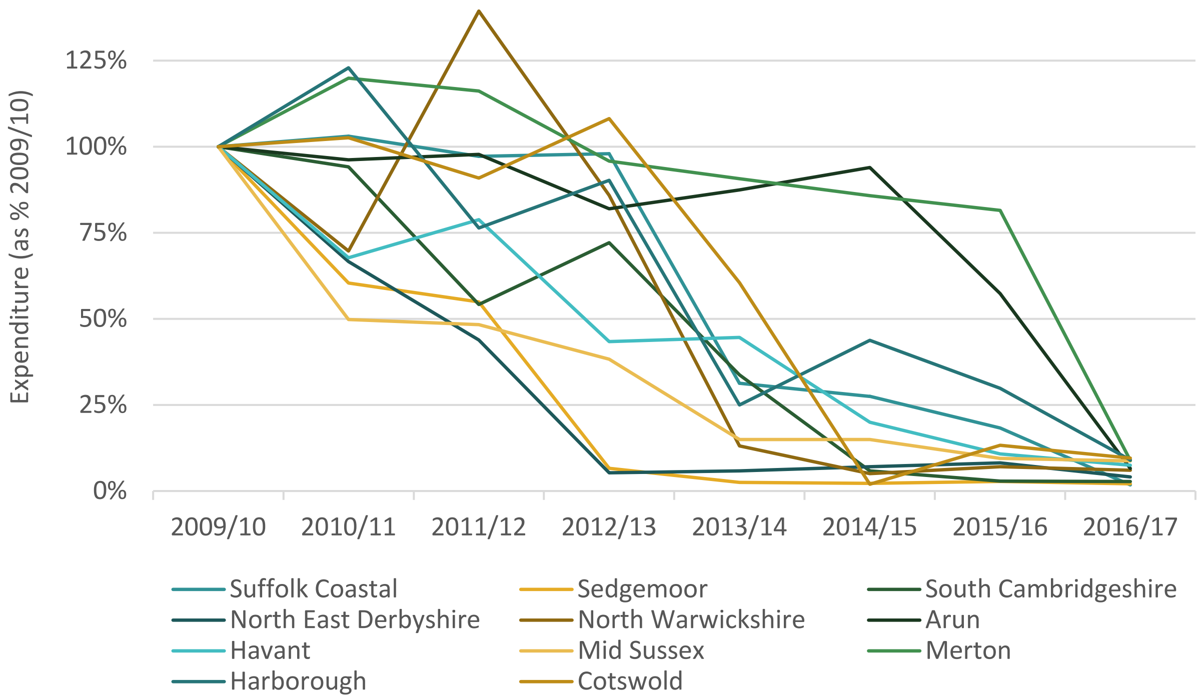


Figure 88: Spending over time of the 11 local authorities who have reduced their expenditure on arts and culture by over 90% since 2009/10

(£ thousands)	*09/10*	*10/11*	*11/12*	*12/13*	*13/14*	*14/15*	*15/16*	*16/17*
Suffolk Coastal	393	405	382	385	123	108	72	7
Sedgemoor	715	432	393	47	18	16	20	15
South Cambridgeshire	308	290	167	222	104	18	9	8.51
North East Derbyshire	171	114	75	9	10	12	14	7
North Warwickshire	99	69	138	85	13	5	7	6
Arun	183	176	179	150	160	172	105	12
Havant	316	214	249	137	141	63	34	24
Mid Sussex	674	336	326	258	101	101	64	59
Merton	3797	4553	4412	3639	3443	3258	3095	338
Harborough	144	177	110	130	36	63	43	13
Cotswold	760	780	691	822	460	15	101	73

- Of the ten local authorities which demonstrated the least fluctuation in expenditure between 2009/10 and 2016/17 (in terms of percentage decrease/increase), two fifths were in the East of England, with a further fifth each in the North West and West Midlands.
- Funding of arts and culture in other local authority areas remained steady, however, and one or two increased funding despite the economic downturn. The Warwick Commission (2014) discerned a pattern of significant urban areas as major cultural centres where investment has either been maintained or reduced at a far lower rate. In particular, arts and culture investment has fared better in cities whose mayors have been forceful and determined in fighting for the arts.
- As an example of this variation, the Museums Association (2018) reported that 39% of museums run by local authorities said that their overall funds had decreased in the past year, compared to 18% saying these had increased, and 42% reporting no change. Many independent museums formerly run by local authorities also reported funding difficulties, with more than half (54%) saying that their overall funds had decreased. A large proportion (38%), however, said that the amount had increased.
- Many of the sources reviewed focus on the imbalance of funding between London / South East and other areas. The main points of their analysis can be summarised by the Warwick Commission (2014):
  - A major issue that has become increasingly central to the debate around arts and cultural funding is that of the distribution of resources between London and the rest of the country.
  - The widely-discussed report entitled *Rebalancing Our Cultural Capital* highlighted the notable London bias in centralised arts funding, which is compounded by decreasing spending levels in local authorities outside London, leaving the regions dramatically under-resourced and underprovided

for. The authors of the report call for bolder partnerships between local governments and arts organisations, and for the prioritisation of the regions in distributing Lottery 'additional' arts funding.

- Per head, the London region spends more on arts and culture than any other, and London boroughs spent more than any other authority type. A London Councils (2014) report found that, in 2013/14, London boroughs spend £26.07 per head and London as a region spends £27.29 per head compared with the England average of £21.84.
- Per authority, London has consistently spent more than double the national average each year.
- This seems to support the assertion made by the Chief Culture and Leisure Officers Association in the evidence it submitted to the CMS Committee, which held that *"the regional impact of diminishing local authority investment in culture will be felt disproportionately in those parts of the country where cultural infrastructure is already weak, and/or where wider socio-economic disadvantage and market failure have created a dependency on public sector investment. This means that some communities, and arguably those with most to gain from engagement in culture, will lose out"* (Chief Culture and Leisure Officers Association, 2016).

Figure 89: Regional proportions of arts and culture expenditure (2016/17)

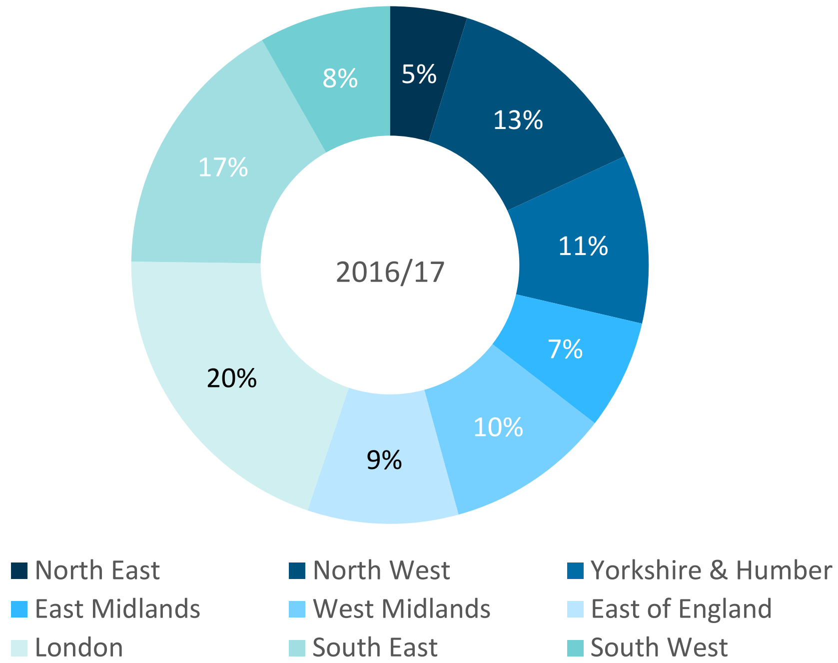
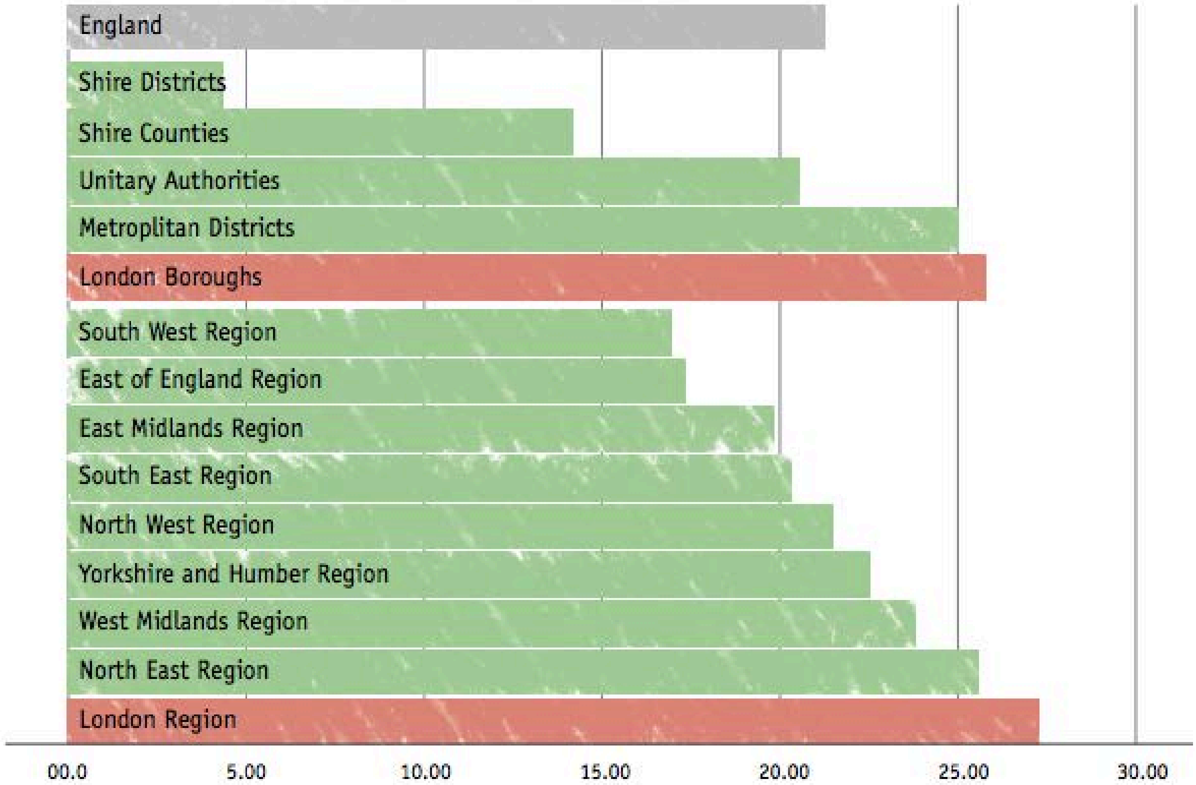
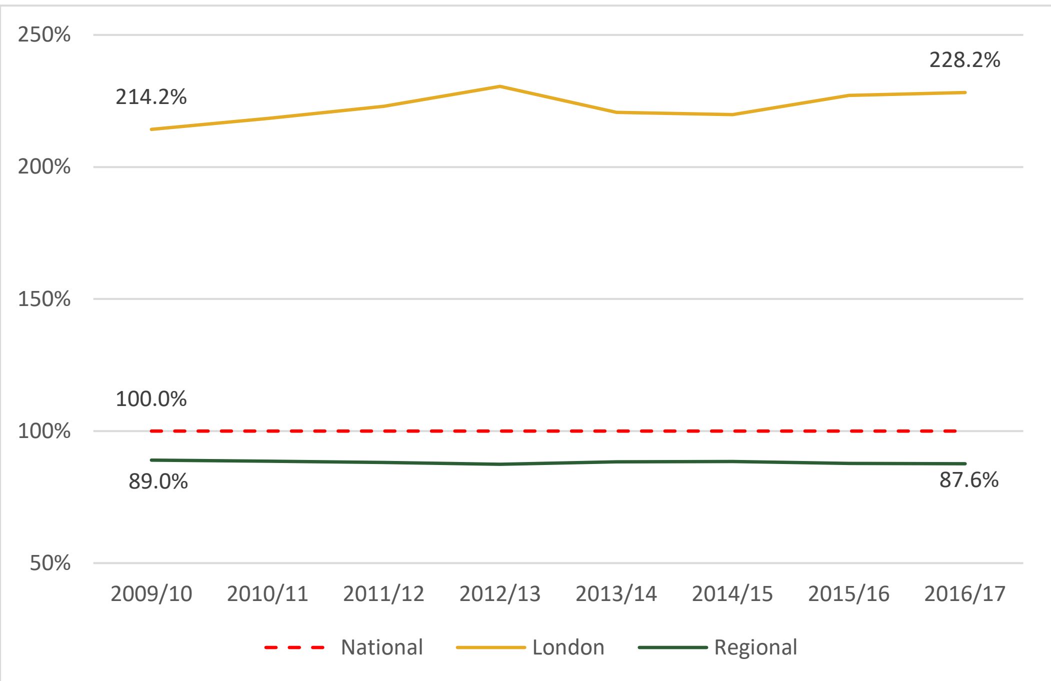


Figure 90: Local authority expenditure per head on arts and culture by region and authority type 2013/14



Source: London Councils (2014), using DCLG Revenue Account Budget data 2013/14

Figure 91: Average expenditure per authority in London and the regions as percentage of national average



4.2.2. Future changes

- The 2015 Spending Review set out proposals for the Revenue Support Grant to more than halve, from £11.5 billion in 2015 to £5.4 billion by 2020. (Her Majesty's Treasury, 2015).
- An Arts Council and NLGN report into the impact of public spending cuts on arts and culture (New Local Government Network, 2016) noted that, although the arts and culture sector faced considerable cuts in the run up to 2016, they should expect continued cuts for at least two more years and that the long-term prospects for funding remain very constrained.
- This report documented a 16.6% reduction in spending across arts and culture between 2010/11 and 2014/2015, although in 2015 this was lower than the rate of reduction in spending overall, suggesting that some local authorities were protecting arts and culture spending at that time. In terms of *actual* expenditure, there was a 15.9% reduction over the same period. By 2017, the reductions on 2010/11 funding stood at 25.9% net and 23.7% actual (Department for Communities and Local Government, 2011-17).
- The Arts Council's analysis of reductions in funding among its NPOs found that the fall in funding has been roughly proportionate across the country and at a relatively smooth rate, except for some dramatic reductions in the East and West Midlands in 2012. However, reductions in funding of MPMs (before they were included within the Portfolio) is more mixed.
- These findings are supported by the evidence submitted to the Culture, Media and Sport Committee's enquiry (2016).The Committee report expresses concern that as reductions in local government allocations continue, local authorities will only have resources to cover statutory services and will further reduce funding for culture. There is, therefore, the risk of 'cultural cold spots' developing in parts of the country that already have least access to arts and culture.
- An ADUK survey of local authority commissioners in 2017 found that the average projected local authority budget for arts spending in responding authorities (including outsourced service operators) in 2017/18 is £778,060, down from the 2016/17 figure of £833,314 indicating a reduction in budgets of 7%. The total estimated spend in England and Wales on arts services for 2017/18 was projected to fall to £179,731,860: a decrease of £12,763,674 (7%) on 2016/17. This survey found greater cuts in England than in Wales (7.4% vs 2.7%). It also found that some local authorities were considering closing their arts service or contracting out, with the vast majority (68%) predicting a funding decrease even where an arts service will be maintained (Arts Development UK, 2017).

4.3. New business models

- Twelve separate sources were uncovered which document new business and financial models across the arts and culture sector. Of these, the Culture, Media and Support Select Committee Report *Countries of Culture: Funding and support for the arts outside London* (2016) includes over 100 submissions of evidence from individual arts and culture organisations, and national and representative bodies.

- In summary, across these sources the following new types of business models were described:
    - Revenue generation schemes;
    - Investing in digital business development;
    - Participation-based business models;
    - Maximising individual giving and donations;
    - New operating models;
    - Collaborative models;
    - Endowment grants;
    - New investment and financing approaches; and
    - New commissioning relationships.
- Some approaches have been more successful than others. Where information about the relative success of new models is available it is set out in the relevant section below.
- An Arts Council England (2015b) paper discusses international funds that award higher amounts to mid-career artists as one-off or monthly payments for a period of time to enable them to free up time to develop their artistic practice and talent, or for them to address a number of clearly defined career objectives, often aimed at developing their resilience and market-readiness. These awards (which in the UK have included the Paul Hamlyn Breakthrough Awards and NESTA Fellowship) carry kudos in the sector, and most are not related to an end product. There are a few examples of 'no strings attached' style arts funding for artists in England:
    - Paul Hamlyn Foundation – individual artist awards for which artists must be nominated. They cannot self-submit.
    - Jerwood Charitable Foundation – individuals can apply for large and small grants, as well as for opportunities for individuals which are offered by existing projects and programmes. These can include training, commissions, research and/or production opportunities for artists, writers, producers and curators.

4.3.1. Revenue generation schemes

- The Culture, Media and Sport Committee's report (2016) details the following examples of new revenue generation schemes:
    - Ticket pricing schemes such as 'pay what you feel' or pay what you think it's worth"' schemes which are also noted as having the potential to increase participation;
    - Emphasising donations alongside ticket sales and maximising Gift Aid; and
    - New retail products.
- The Mendoza Review (Mendoza, 2017) also documents examples of new revenue generation approaches such as the introduction of new value offers e.g. tickets giving 12 months' entry for the price of a day ticket. This model is reported to have been particularly good at increasing participation through repeat visits.

- The vast majority of investment in artists is project based, whether directly through Grants for the Arts, or indirectly through NPOs. Arts Council England's Developing Your Creative Practice seeks to focus on direct artist funding. ACE analysis (2015) found that individual artists typically have a higher rate of rejection than applications from organisations:

Figure 92: Proportion of funding going directly to individuals

Fund	Total Value	Direct to individuals	Notes
Grants for the Arts 2012-15	£201m	£48m (23.8%)	The average over a 4 year period is 21% to individuals. A proportion of the £153m awarded to organisations will also be indirectly supporting artists
NPO investment 2012-2015	£1.04bn		Indirect % on artist fees and commissions (£540m in year 14/15 was non-staff expenditure, of which £142m was spent on commissions and fees - though it difficult to estimate levels of financial benefit to individuals)
AIDF 2012-15	£750,000	£750,000	Direct support to artists – not project focussed
Momentum 2013-15	£500,000	£500,000	
Unlimited	£1.5m	£1.5m	Project Focussed

Source: Arts Council England (2015b) *Grants for the Arts Data*

4.3.2. Investing in digital business development

- The National Skills Academy Network with Creative and Cultural Skills (2015) found that the intersection between the digital world and the creative industries offers great potential, and will depend on a recalibrated workforce that can mix creativity with technical coding and programming skills, along with knowledge of STEM subjects.
- This higher level of technical skills and knowledge is set to remain essential to the creative and cultural industries over the coming decade. The *Building a Creative Nation: The Next Decade* (2015) report notes that the creative sector needs people with the depth of technical skill that enables them to 'make and do' as well as to conceive ideas.
- Statistical evidence shows that there is increasing scope for creative workers to bring their skills to the wider economy, outside of a narrow range of arts-based industries. Creativity in leadership is widely valued, for example, and has become increasingly prevalent, and in-demand, as a specific skill set. It is important to foster an environment in the world of work in which creativity can thrive.
- MTM (2017) found that there had also been a significant increase in the proportion of arts and cultural organisations reporting major positive impacts on their business model and operations of digital activities (up from 51% in 2013 to 68% in 2017). The main areas in which digital activities appear to be supporting business models are:

  - Marketing and raising awareness of the organisation and audience engagement – several measures of this type of activity demonstrate significant increases in impact since 2013;
  - Selling tickets online and raising donations – digital development has had a significantly greater impact on both activities have than in 2013; and
  - Boosting profitability – again the positive impact of digital is significantly greater than in 2013.
- Nesta (2018) describes new digital funding solutions that could benefit arts and cultural organisations, including micropayments, different models of ‘crowdfunding’ platforms which connect creators with audiences on an ongoing basis, dynamic pricing and digital distribution
- The Digital Arts and Culture Accelerator programme, which ran for 6 months in 2016, explored the potential for arts and culture organisations to develop products that would be attractive to private investors. It worked with a cohort of 9 arts and culture organisations.
- The evaluation of this programme, published by Nesta (2017) found that while the accelerator process helped develop clear product ideas and knowledge of new commercial business models among participating organisations, none of the participants achieved new commercial investment.

4.3.3. Participation-based business models

- Several sources bring together themes of participation with new business models, including:
  - New ‘Friends’ Associations (Culture, Media and Sport Committee, 2016); and
  - Crowd-funding and community share schemes to generate income and create over a community of 3,000 shareholders who are actively engaged in the project. (Culture, Media and Sport Committee, 2016).
- The Mendoza review (2017) gives examples of museums that have invested in events and festivals, developed volunteering opportunities, and prioritised work with local communities. This kind of work is estimated to have increased both participation and turnover of cultural attractions and increased the volunteer workforce available to the organisation.
- The Warwick Commission’s discussion paper (2014) points to the sector’s reliance on the volunteer workforce, finding that there were 25,000 voluntary employees in the arts and culture workforce in 2014, which is 24% of the total (voluntary and salaried) workforce.

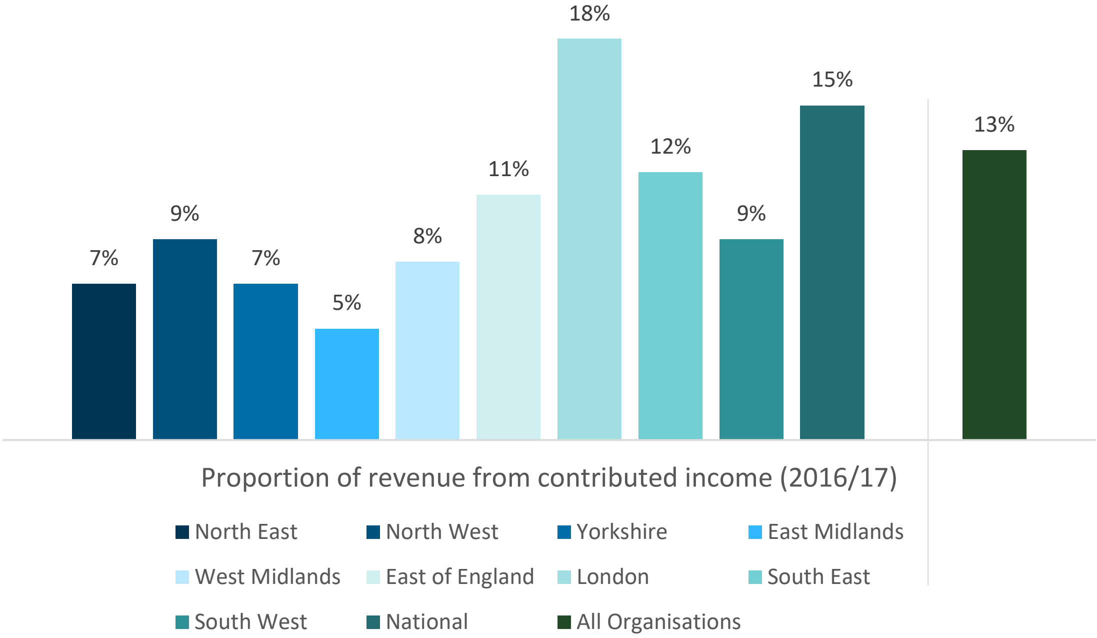
4.3.4. Maximising individual giving and donations

- The evidence shows that individual giving is a key growth area for the sector.
- In 2016/17, regular and one-off donations accounted for 45% of all contributed income, equating to 5.9% of all revenue (Arts Council England, 2018f).
- As above, an exact comparison with 2009/10 is not possible due to variation of sample, but donations in that year accounted for 47% of contributed income, equating to 4.5% of all revenue (Arts Council England, 2011).

- In real terms, donations in 2009/10 amounted to approximately £49m, while in 2016/17 that figure had risen to £79.1m.[18]
- The Mendoza Review (Mendoza, 2017) documents examples of museums and galleries changing their internal culture to ask for donations at different points and in different ways. Larger organisations have far greater power to attract individual donations: among the 649 NPOs surveyed in 2016/17, they accounted for 95% of all individual giving (both regular and one-off) (Arts Council England, 2018f).
- This also is more generally the case among organisations which receive public funding, regardless of size. Stephen Hetherington (specifically writing about theatre) argues that those organisations operating under subsidy have reduced financial risk, and therefore *"can then attract private finance under marketplace logic"*. He notes that *"it is common to find public subsidy in receiving theatres amounting to as little as 3% to 5% of turnover, but these small contributions make possible multi-million pound operations"* (Hetherington, 2015).
- However, the evaluation of Catalyst showed that being London-based is not necessarily an advantage: *"the … analysis provided only some empirical support to previous evidence that suggests that being based in London is associated with a greater ability to raise private giving income. The results were not unequivocal and in fact there were some that challenged the conclusion that 'geography is destiny"* (BOP Consulting, 2017).
- This conclusion is specific to the Catalyst programme, though: the Arts Council's 2016/17 survey of NPOs found that London-based organisations reported a higher proportion of contributed income than elsewhere – 18% as compared to a national average of 13% (though note that NPOs with "significant national reach beyond the region of their home base", nearly half of which are in London, are counted in a separate category) (Arts Council England, 2018f).

[18] Inflation adjusted to 2010 levels using the Bank of England's 'Inflation calculator' (https://www.bankofengland.co.uk/monetary-policy/inflation).

Figure 93: Proportion of revenue from contributed income (2016/17)



4.3.5. New operating models

- New operating models have primarily been applied to organisations that were previously under local authority control, including museums, libraries and local authority arts development services.
- A NLGN survey of local authorities in 2014 found that, as a result of funding cuts, local authorities are increasingly looking at alternative models of supporting arts and culture. Nearly 70% of survey respondents stated that they had implemented or considered implementing standalone trusts or community interest companies for their arts development or cultural services and 60.7% stated that they had implemented or considered implementing moving from a grant aid to commissioner/provider relationship. This report also provides examples of local authorities sharing cultural service delivery costs (New Local Government Network, 2014).
- The Mendoza Review (Mendoza, 2017) states that one way to reduce barriers preventing greater enterprise is through the granting of trust status which awards museums greater financial and governance freedoms. At the time of the report, there were 64 local authority museum trusts in England, and the Arts Council England Accreditation data suggest the trend is accelerating (prior to 2004 there were only six). The greatest take up is in the South East and West Midlands.
- The latest data from the Museums Association (2018) support this assertion: 50% of independent former local authority museums said that their income from grants and donations had increased, compared to 28% of local authority museums. About half of independent museums (47%), national museums (53%) and military museums (50%) surveyed also said they had increased income from these sources.
- Overall, in contrast with the 2015 survey, those former local authority-run museums that had moved to trust status had become much better able to diversify their income than museums dependent on local authority funding.

- The NLGN (2014) describes similar arrangements for public library services including:
    - Putting existing organisations out to trust or similar arm's length arrangements e.g. public service mutuals, industrial and provident societies etc.;
    - Social enterprise, where services are provided through an organisation which reinvests profit back into its core mission, offering an opportunity to sustain services;
    - Community ownership and management now account for the running of a number of libraries, but there are still questions over the extent to which such organisations and services can be run by volunteers and the extent to which the council will still have to provide a measure of support; and
    - Existing third sector delivery, wherein some local authorities are turning to successful third sector organisations in or close to their area to deliver new cultural services (rather than deliver services internally or create new external bodies).
- However, the CMS Committee (2016) makes a distinction between those Local Authorities "*adapting with new management models and approaches to income generation"* and those resorting to *"asset disposals…and hasty transition to trust status"*. The latter is identified as a risk to quality of service and access to the arts and culture.
- NLGN (2014) echoes this concern. It describes the benefits of trust status, such as a reduction in public subsidy through placing the services in an arm's length arrangement which encourages entrepreneurialism and frees up capacity and ability to exploit new income streams. However, it also points to the need for resource endowments and freedoms provided to exploit resources to support the sustainability of trust arrangements.

4.3.6. Collaborative models

- Several different types of collaborative models are documented, including:
    - 'Hub' structures, where a group of cultural organisations shares some functions, whilst still being individually managed, can help ensure that staff build up necessary skills on issues like insurance, security and transport, and establish deeper relationships with national lending institutions (Culture, Media and Sport Committee, 2016).
    - Developing creative productions in partnership with other institutions e.g. museums touring parts of their collection to each other in reciprocal arrangements. (Culture, Media and Sport Committee, 2016). Devlin & Dix note, with regard to theatre touring, that Europe operates a model which focusses more on co-productions and exchanges than on a UK-style notion of receiving work from other organisations (Devlin & Dix, 2015).
    - Sharing back office functions, for example SPINE (Shared Partnership in the East), where the Cambridgeshire County Council's library service, Suffolk Libraries IPS, Suffolk County Council and Norfolk County Council library

    service share the IT for the libraries' management system – something which has led to wider collaboration (Nesta, 2018).
    - Co-working spaces for artists and creative businesses in urban areas with high rent are becoming more prevalent. In 2017, there were over 150 co-working spaces – a gain on the 132 in 2014, which itself comprised a 50% increase since 2012 (Nesta, 2018).
- Devlin and Dix make reference to the USA's National Performance Network (NPN) – and organisation comprising 61 members *"which form an interconnected web of relationships with the objective of supporting artists in the creation and touring of contemporary performing and visual arts. It does this through subsidies to the NPN Partners who chose the artists they present"* (Devlin & Dix, 2015).

4.3.7. Endowment grants

- Heritage Endowment Grants – e.g. Derby Museums – provide a long-term source of funding through investments (Mendoza, 2017)
- However, low interest over recent years has made this a less attractive option. At 1.5% interest, for example, an income of £75,000 pa would require an endowment of £5m (Devlin & Dix, 2015).

4.3.8. Investment and financing models

- Despite being considered normal in all other commercial markets, investment is comparatively rare among subsidised arts organisations; instead, they operate primarily through grants from public bodies, earned income from ticket sales or retail, and philanthropy (including trusts, etc.) or corporate sponsorship (Nesta, 2014).
- Nesta (2018) states that arts and culture organisations need access to affordable risk capital to be able to invest in new revenue streams and to grow existing ones. This report refers to a market sizing survey for repayable finance that Nesta commissioned, which indicates future demand from arts, culture and heritage organisations of £309 million spread over the next five years.
    - Nesta describe pooled funds such as the Arts Impact Fund as one means of providing this capital. It also indicates that philanthropists and high net-worth individuals could replicate this model if they wished to have more direct impact on an organisation or art form than is afforded by the Portfolio approach (dependent on how conducive the tax environment is).
- The Arts Impact Fund (2016) describes the findings from the first year of its £7 million Arts Impact Fund pilot programme. The Arts Impact Fund was intended to demonstrate the potential and impact of social investment in the arts to possible investors, eligible borrowers and the broader sector.
    - It provides primarily unsecured loans to arts and cultural organisations in England of £150,000-£600,000, at affordable interest rates, repayable over a three to five-year period.
    - The Arts Impact Fund received 79 enquiries for loans up to 20 July 2016, of which 8 applications had been approved and three loans had been legally completed with a total loan value of £1.1 million.

- Another programme for increasing organisations' access to funding was Catalyst, a £100 million culture sector-wide private giving investment scheme aimed at helping arts organisations to diversify their income streams and to access more funding from private sources (funded by Arts Council England, Heritage Lottery Fund and the DCMS).
    - In BOP Consulting's evaluation of the three-year scheme, they reported a *"dramatic turnaround in the cost benefit of fundraising within organisations from pre-Catalyst to post-Catalyst, with the majority (67%) now reporting their fundraising activities are cost-positive. This constitutes a 34 percentage point increase from Year 1, in which only 33% of grantees reported that their fundraising activity was cost-positive"* (BOP Consulting, 2017).
    - Catalyst also had a sustained impact in terms of internal organisational policy: 86% of organisations have continued to launch campaigns, and to invest in capacity building activities like training (72%) and consultancy (47%), as well as activities that build support bases, like membership schemes (46%) (BOP Consulting, 2017).
- The CMS Committee (2016) also describes how some organisations are benefitting from social investment tax relief. This can be seen across industries as a whole: for instance, there was a marked increase in UK-produced films after a tax relief scheme was introduced for the British film industry in 2007 (Devlin & Dix, 2015).
- Devlin and Dix (2015) highlight opportunities for other funding models within the theatre industry, including:
    - Return on Investment (RoI) schemes, in which a non-governmental agency uses some of its public funds on a commercial or quasi-commercial initiative. Potentially, therefore, some or all of the expenditure can be recycled at the end of a project, or may – in the case of large-scale, successful production – return a profit which would allow for development and exploitation of further work. The authors recommend that any investment fund is developed through a third-party company which is not directly controlled by the Arts Council, or a joint-venture comparable to (but with different criteria from) the Arts Impact Fund.
    - Social Investment Tax Relief, designed to encourage interventions with a social purpose. It is not restricted to the cultural sector and aimed at investors in social enterprise who might provide capital for social purpose organisations who are not profit-maximising (e.g. fund managers, high net-worth individuals or foundations, etc.). *"This mechanism is based on the making of an unsecured loan or taking shares (both of which must be held for three years) in a business (or subsidiary) conducted with a view to profit, including companies with a parent that is a Charity or a Community Interest Company. 30% tax relief is available on a maximum annual investment by an individual investor of £1m. The main benefit of such a scheme will be income tax relief but capital gains tax relief is also available."*
    - Enterprise Investment Schemes, which are intended to help smaller, higher-risk companies raise finance by offering tax relief on new shares. For the

investor, it is a tax efficient way to invest in small companies – up to £1m per person per year.

    - Seed Enterprise Investment Schemes, aimed at start-ups, have been utilised by companies within the creative industries and may be useful for small, non-charitable companies in the cultural sector.

4.3.9. New commissioning relationships

- Rather than direct provision of services, public bodies *"…are now looking to external organisations and companies to provide services on their behalf. Public bodies have been moving in the direction of becoming purchasers, rather than direct providers of services."* (Consilium, 2016c). In 2014, 60.7% of local authorities either had moved or were considering moving from grants aid to a commissioner/provider relationship (New Local Government Network, 2014).
- This is particularly the case with regards to health and social care provision: *"A sector trend towards delivering wellbeing through creativity and culture (contingent on changes in the health sector as well as growing acknowledgement of the relationship between creativity and health) creates the potential for new and resilient business models, for instance through social prescribing."* (Chatterjee, 2018a)
    - Chatterjee also notes that, while still a reasonably young area of research, there is considerable activity within the museums and galleries sector to identify and advocate for the health benefits they seem to provide – perhaps giving good ground for more such commissioning relationships to develop (2018b).
- The evidence for new relationships between arts and cultural providers and health and social care commissioners comes primarily from the Cultural Commissioning Programme, which was funded by Arts Council England. It is not clear from the evidence available how much arts and culture activity is being commissioned to support health and wellbeing agendas outside of this programme.
- New Philanthropy Capital (NPC) and NCVO highlighted the potential for cultural commissioning in 2014, as responsibility for public health commissioning devolved to Local Authority level (Bagwell, Bull, Joy, & Svistak, 2014).
- The New Economics Foundation (2016) provides different models for commissioners to engage with arts and culture organisations together with case study examples of where this has been successfully achieved through the Cultural Commissioning Programme (CCP).
- Consilium's (2016c) evaluation of the Cultural Commissioning Programme points to some local authorities where new funds are being directed to support arts and cultural delivery and cultural commissioning activity. This includes arts organisations supporting mental health and more general health and wellbeing needs. The evaluation points to learning and commissioning models that can support cultural commissioning in other localities which have emerged from the programme.

4.4. Key barriers and enablers of change in organisational resilience

- The barriers and enablers identified in the literature have been divided into two broad categories:

- **Contextual and external issues**: these are issues that the sector does not have direct influence over, but which have a strong impact on the success of their organisational resilience and environmental sustainability:
    - Economic and political factors;
    - Increasing competition;
    - Challenges faced by organisations outside London;
    - Empowerment of new governance structures;
    - Impacts of grant funding; and
    - Factors affecting the development of new commissioning relationships.
- **Sector-specific issues**: these are issues that relate to characteristics of the sector that can either support or prevent sustainability:
    - Workforce skills and leadership;
    - Factors affecting new commercial investment models in the sector; and
    - Need for better articulation of the value arts and cultural organisations provide.
- In practice, however, external and sector-specific issues are inter-related.

4.4.1. Contextual and external issues: Economic and political factors

- While the evidence shows that the general trend in the sector is towards more diverse funding models, and even some increase in income among some organisations and sectors, some sources stress the fact that new income sources are no substitution for public subsidy. For example, the National Museum Directors’ Council (2016) argues that hub models and inclusion of culture into the local LEP both seem to be helpful, but cannot by themselves provide a sufficient response to the current funding challenges.
- In addition, the constrained funding environment means that although many organisations wish to invest in research and development of new business models, in practice they can find that they do not have the resources required to bear the high cost of development (National Museum Directors' Council, 2016).
- Nesta (2018) found that an increase in property prices has made it harder for artists to find studio space. It estimates that if property prices continue to follow this trend it would exacerbate this problem, particularly in areas where the issue is already most pronounced like London and the South East. Over the long term, it predicts that this trend could affect the range of work that is produced, the location of creative activity in the UK and the extent to which work is produced in the UK at all. It proposes more provision of low-rent and co-working spaces for artists and the creative industries to support their development.
- NLGN (2014) identified that local funding for the arts and culture are reliant on local leaders taking a particular interest in arts and culture. It mentioned that making arts and culture a statutory duty has been suggested as a way to deal with the risk of relying on the judgement of individual political leaders, however this could end up being a ‘tick box’ exercise rather than a solution to funding cuts.

- Both NLGN (2014) and the Local Government Association (2013a) focused on the need to make the case for arts and culture as part of local economic development and/or health and wellbeing.
- Mendoza (2017) found that there was a general consensus amongst the philanthropic funders consulted that they do not like to fill gaps left by the loss of public funding. They are also unlikely to fund institutions considered financially unsustainable, for example due to their loss of core funding.
- MTM (2016) identified the slowing economy as a key barrier to success of private fundraising activities. Devlin and Dix (2015) noted that funding from trusts and foundations are more scarce as a result of historically low interest rates, while contributions from the private sector have also been weaker – either as a result of businesses struggling in general or through prioritising spending on things which have obvious shareholder value.
- Nesta (2018) predicts that the impact of the UK leaving the European Union will be, as in other sectors, potentially significant for the arts – and could affect the sector's access to international talent, export markets and sources of funding.
- Market volatility in the wake of the Brexit announcement may specifically have an impact on giving by trusts and foundations, with the Association of Charitable Foundations noting that there are signs of slowing economic growth which could lower the value of assets (Pharoah, Walker, & Goddard, 2017).
- There is a call for tax breaks for social investment (Nesta, 2018), and a reduction in business rates for museums (Mendoza, 2017) as a way for government to mitigate the impacts of economic and political policy developments and encourage new business models.

4.4.2. Contextual and external issues: Increasing competition

- Several sources (e.g. BOP Consulting, 2017; Devlin & Dix, 2015) identify growing competition for funding from trusts and foundations as well as corporate and individual giving as a barrier to sustainability for arts and cultural organisations. The reasons for this include reductions in public funding sources, increased focus on income diversification across the sector and international competition.
- Nesta (2018) predicts greater opportunities offered by an increasingly global cultural marketplace but that this will also create greater competition for global attention and space for artistic activity. It cites digital technology, new approaches to finance, and the exploitation of data as key areas of opportunity for new commercial and operational activity.

4.4.3. Contextual and external issues: Challenges faced by organisations based outside London

- Several sources highlight the challenges of fundraising for organisations either based outside London or touring outside London. This includes corporate sponsorship by large organisations and the lack of local businesses willing or able to support the arts in their area.

- The CMS Committee highlights the work that the Arts Council is doing to address this issue, by allocating 70% of its £70 million Catalyst fund (which develops fundraising skills) to areas outside London (Culture, Media and Sport Committee, 2016).
- However, Nesta (2018) cautions against too radical a reshaping of the cultural and creative industries, because this could destabilise creative clusters based in London and may also reduce the ability of the UK to compete with other nations in the global cultural marketplace, as donors and investors move to other global cultural capitals rather than transferring their support to other parts of the UK.

4.4.4. Contextual and external issues: Empowerment of new governance structures

- There is some ambivalence about moving local authority delivered services to trust status. Mendoza (2017) CMS Select Committee (2016) and NMDC (2016) argue for appropriate measures to support new governance structures to enable trusts to thrive in the longer term.
- The NMDC (2016) argue that, as local authority museums move to trust status, they need greater freedom and flexibility to trade, so that they can invest major donations over a period of time (rather than spend donations in one year) and have more flexibility over opening hours, for example.
- Mendoza (2017) reports that consultation respondents suggested that local authorities could take advantage of community asset transfers and provide museums with the ability to generate their own income. He also identifies that trusts are likely to struggle if they do not have clear legal agreements with the relevant local authority and are not freed up from the unnecessary bureaucracy of local authority control.

4.4.5. Contextual and external issues: Impact of grant funding

- Mendoza (2017) calls for funders to prioritise grant funding to improve sustainability. He notes the findings from a Heritage Lottery Fund (HLF) survey which finds that only 10% of HLF grant recipients felt their grants had improved their long-term sustainability. He welcomes the Arts Council’s Resilience Fund, but raises the question of whether it is working with HLF to co-ordinate their respective resilience funds.
- Other mechanisms for change include the Catalyst Fund and the HLF Resilience Fund, which are discussed in more detail elsewhere in this chapter.

4.4.6. Contextual and external issues: Factors affecting the development of new commissioning relationships

- Consilium’s evaluation of the Cultural Commissioning Programme (2016c) identifies some barriers to the roll-out of cultural commissioning, including:
    - Ongoing restructuring of key public services;
    - Variable effectiveness of local brokerage in bringing the cultural sector together;
    - Decreasing budgets facing many public services including CCGs, public health and adult social care; and
    - Lack of evidence of effectiveness of preventative approaches to health and wellbeing (which is where most arts and cultural activities sit) and variability of attitude to preventative work among different commissioners.

- It finds that as a result, there is a danger of commissioners retrenching and focusing on more traditional service models rather than exploring and co-designing new services in collaboration with the arts and cultural sector.
- In order to address this issue, the report calls for effective policy support for both public service commissioners and the arts and cultural sector to prevent drift as both direct capacities to respond to more acute pressures within their respective sectors.

4.4.7. Sector-specific issues: Workforce skills and leadership

- Workforce skills and leadership are identified by many sources as key enablers or barriers to environmental and financial sustainability.
- Lack of fundraising, business development and digital skills were all raised as barriers to organisational sustainability.
- In particular, small arts and cultural organisations are described potentially lacking access to the skills needed adapt to new funding environments. Nesta (2018) suggests that investing in the skills of the workforce as well as sharing specialist skills between them in a more collaborative model could overcome this issue.
- The CMS Committee (2016) suggests that demand for professional development opportunities outstrips supply, pointing to the fact that the Arts Council's Catalyst fund typically supports half of the applications made. It also suggests that those who need skills the most are least likely to receive development, with 67% of the Catalyst fund allocated to existing NPOs.
- Despite the focus on digital business development among arts and cultural organisations, Nesta (2017) found little change in digital skills in the sector between 2013-2017. It found that this is still an area where the majority of organisations feel that they only have basic skills compared to their peers (55% claiming basic skills).
- However, in general, NPOs and London-based organisations are likely to be more digitally active, experience fewer barriers, have better access to skills, are more likely to be engaged in R&D activities, and are more likely to report positive impacts than the arts and culture sector as a whole. The divide between larger-scale / London-based arts organisations and smaller / regional ones is as present within this issue as others.
- The Social Value Lab and Julie's Bicycle (Social Value Lab, 2017) found that the support of senior management and leadership was a key factor in successfully adopting more environmentally sustainable practices.
- Nesta (2017) also pointed to the importance of the board and executive leadership aligning behind new investment models for them to succeed.

4.4.8. Sector-specific issues: Factors affecting new commercial investment models in the sector

- The Digital Arts and Culture Accelerator programme, which ran for 6 months in 2016, explored the potential for arts and culture organisations to develop products that would be attractive to private investors. It worked with a cohort of 9 arts and culture organisations. The evaluation of this programme, published by Nesta (2017) found that while the accelerator process helped develop clear product ideas and knowledge of new commercial business models among participating organisations, none of the participants achieved new commercial investment. The evaluation report cites the following challenges:

  - Structural and cultural barriers to investment readiness;
  - Lack of appetite for commercial investment in arts and culture organisations;
  - Conflict between some of the commercial development approaches with the mission and values of the organisation;
  - Lack of investor awareness and interest in cultural organisations; and
  - The potential conflict or differing agendas of commercial investors, who seek high returns, and the aims of arts and cultural organisations, who wish to develop their resilience through a varied funding portfolio.

- It concludes that *"the challenge of organisational change in a context of low levels of investor awareness and appetite for arts and cultural organisations, suggest that sustained commercial investment in arts and culture will require significant strategic development over a sustained period"* and that this type of investment will not offer a 'replacement mechanism' for public funding.
- The Arts Impact Fund (2016) also found that arts and cultural organisations are often unnecessarily conservative in their estimates of return on investment when making the case for investment. It found that trustees prefer not to borrow without an asset in place (even where that is not being used as collateral), but that this is not necessary, and boards could be more empowered to seek borrowing from social investors even when they do not own a physical asset which can serve as collateral. This in turn led to a concern that this may perpetuate a sense that social investment is only available for those with significant assets already, rather than being seen as a tool to help build the balance sheets of innovative organisations.
- In terms of the investment tool currently available through the Arts Impact Fund, it finds that the current short terms of loans can put off potential borrowers. It suggests that longer-term funding would unlock a greater pool of potential borrowers and expand the likely purposes for borrowing to a greater proportion of non-capital projects where refinancing isn't an obvious option.

4.4.9. Sector-specific issues: Need for better articulation of the value arts and cultural organisations provide

- Several of the barriers to effective development of environmental and financial sustainability relate to lack of focus on the value and impact provided by arts and culture.
- The CMS Select Committee (2016) received a submission from Peter Bazalgette, then Chair of Arts Council England, which stated that only 8% of the population recognised arts and culture organisations as charities. This was identified as a marketing communications challenge, because of competition for funds.
- In addition, more than one source identified the issue of cultural organisations not seeing themselves as charities and not articulating their work in terms of the social benefits it provides. This is seen as limiting the fundraising potential of those organisations with corporate and individual donors.
- The Arts Impact Fund (2016) noted that return on investment is not a common measure in arts and culture organisations and that robust theories of change and logic models around specific social outcomes remain unusual in the arts and culture sector compared

with other social sector organisations. It identifies that a low standard of evidence for the social impact produced by the sector is a barrier to keeping track of outputs and outcomes, the efficacy of particular interventions and the communication of impact. However, it also notes that some larger organisations do have sophisticated approaches to measuring impact and that these could be pooled to support organisations who do not have the capacity to develop them.

4.5. Trends in environmental sustainability and carbon footprint reduction

- The sources available in relation to environmental sustainability for the arts and cultural sector are extremely limited, however the methodology used to produce the information set out below is robust and reliable. It would be supported by independent verification of the results from a non-Arts Council funded body.
- The Social Value Lab and Julie’s Bicycle (2017) report that since the previous survey in 2014, the trend is towards environmental sustainability being a higher priority and more actions being taken across the creative and cultural sectors to improve environmental sustainability. As of 2017:
    - 94% consider sustainability when selecting suppliers and service providers;
    - 92% of respondents to the survey consider environmental sustainability to be relevant to their organisational vision and mission;
    - 84% have an up-to-date environmental policy (vs. 67% in 2014);
    - 83% report organisational benefits from their environmental actions;
    - 81% measure their environmental impacts;
    - 80% consider sustainability for building refurbishment or capital projects;
    - 77% of responses from senior leadership; those reporting as Director or Senior Management level;
    - 48% have a Green Team or Green Champion;
    - 38% are on a green energy tariff or are buying energy from a 100% renewable energy supplier;
    - 36% of organisational environmental policies or action plans refer to specific emissions reductions or other targets that are based on international, national, or local policies; and
    - 15% generate their own renewable energy;
- In 2017, as in 2014, subsidised organisations are still leading the way in terms of developing and maintaining environmental practices, reinforcing the idea that environmental conditions of funding are a strong driver of change. The report identifies that funding conditions and staff commitment, provide the most fertile ground for engagement with environmental sustainability practices. It also points to future collective actions by the sector as having the potential to strengthen and extend associated benefits and accelerate engagement with climate change.
- All NPO organisations and MPMs are required to produce an environmental action plan as part of their funding agreement, and as mentioned above, where funders require environmental sustainability considerations as a condition of funding, this has a strong catalytic effect on change in attitudes and behaviours. NPO and MPM

organisations are therefore key potential change makers in environmental sustainability in the arts.

- Arts Council England and Julie’s Bicycle published a report into NPO environmental sustainability in 2017. It found that the number of organisations able to report robust data increased by 33% since 2012/13, from 469 to 623 organisations in 2016/17. (Julie's Bicycle, 2017)
- The survey found that there was a 21% decrease in energy use emissions (based on electricity and gas) from 74,700 to 59,000 tonnes of CO_2 between 2012/13 and 2016/17 which corresponds to a 5% average annual reduction in energy use emissions with 15,650 tonnes of CO_2 avoided. Onsite generation reporting has tripled over the last year from 314,500 kWh to 1,175,000 kWh and increased tenfold since 2012/13 and 19% of the portfolio organisations have switched to clean energy providers or green tariffs.
- The report estimates that if the average annual reduction continues at a rate of 5%, emissions will have dropped by 60% in 2024/25 and by 85% in 2029/30, compared to 2012/13. The portfolio has managed to save £11 million, compared to not taking action, since 2012/13, releasing more money for the arts. If this rate of reduction continues, £168 million will be saved by 2029/30.
- 49% of NPOs declare financial benefits as a result of their environmental initiatives, compared to 56% in 2015/16. 82% of NPOs find their environmental policy useful to support funding applications, compared to 75% in 2015/16.
- The Social Value Lab and Julie’s Bicycle (Social Value Lab, 2017) found that reduced costs were one of three key drivers of environmental sustainability and conversely that high capital investment costs could deter organisations from taking some measures to support environmental sustainability.
- The Social Value Lab and Julie’s Bicycle (Social Value Lab, 2017) found that funders also play a key role in encouraging environmentally sustainable practices in the arts and cultural sector, which is evidenced through the impact achieved through NPO and MPM funding conditions.

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