

**International Activity
supported by
Arts Council England**



Credits

Written and prepared by

Lizzie Parker, Bianca Corriette and Richard Naylor, BOP Consulting

Data credits

Strategic Research & Insight, BOP Consulting

Image credits

Cover Image: Chris Payne – Diwali – Walk the Plank 2018

Arts Council England Steering Group

Nick McDowell (Director, International), Nicola Smyth (Senior Manager, International), Joe Shaw (Senior Officer, Policy and Research)



**ARTS COUNCIL
ENGLAND**

BOP
Consulting

Contents

	Executive Summary	10
1	Introduction	18
1.1	International cultural activity	18
1.2	This research	20
1.3	Methodology	21
2	Respondent Profiles	26
2.1	Survey respondent profiles (all)	26
2.2	NPO respondents	27
2.3	Grant recipient respondent profiles	30
3	Volume and type of international activity	32
3.1	Volume of activity	32
3.2	Variance in volume of projects undertaken	46
3.3	Type of activity undertaken	51
4	Finances of international activity	64
4.1	NPO finances	64
4.2	Grant recipient finances	71
4.3	Variance	72

5	Geography of International activity	78
5.1	Geographic breakdown of activity	78
5.2	Revenues by geographic region	92
6	Benefits, barriers and enablers	98
6.1	Benefits from international activity	98
6.2	Barriers to international activity	98
6.3	Enablers to international activity	101
7	Internationally inactive respondents	108
7.1	Internationally inactive respondent profile	108
7.2	Barriers and enablers	108
7.3	International readiness	109
8	Conclusions	114
	Appendix A: Case study interviewees	116
	Appendix B: In-depth interviews interviewees	117

Figures

Figure 1	Breakdown of survey respondents by artform, compared with population of ACE-supported organisations and practitioners	26
Figure 2	Breakdown of survey respondents by region, compared with population of ACE-supported organisations and practitioners	27
Figure 3	Breakdown of NPO survey respondents by artform, compared with population of ACE NPOs, 2018/19	28
Figure 4	Breakdown of NPO survey respondents by English region, compared with population of ACE NPOs, 2018/19	29
Figure 5	Breakdown of NPO survey respondents by number of Full Time Equivalent staff (FTEs), compared with population of ACE NPOs, 2018/19	29
Figure 6	Breakdown of NPO survey respondents by annual turnover, compared with population of ACE NPOs, 2018/19	30
Figure 7	Employment status of grant recipient respondent cohort	30
Figure 8	Estimated total number of physical international projects* undertaken by NPOs between 2014/15 and 2021/22	34
Figure 9	Percent of NPOs reporting one or more physical international projects between 2014/15 and 2021/22	36
Figure 10	Number of physical projects reported by internationally active NPOs, 2014/15 – 2021/22	37
Figure 11	Total number of physical and virtual international projects reported across all respondents, 2018/19 and 2021/22	39

Figure 12	Number of virtual projects reported by internationally active NPOs, 2018/19 and 2021/22	40
Figure 13	Average number of physical projects undertaken by NPOs, by turnover, 2014/15-2021/22	46
Figure 14	Average number of virtual projects undertaken by NPOs, by turnover, 2018/19-2021/22	48
Figure 15	Proportion of internationally active respondents (reporting one or more physical projects within a year) by artform, NPOs and All, 2014/15 - 2021/22	49
Figure 16	Proportion of internationally active respondents (reporting one or more physical projects within a year) by English region, NPOs and All, 2018/19 - 2021/22	50
Figure 17	Frequency of activities involved in physical international arts projects, by all respondents, 2018/19-2021/22	52
Figure 18	Frequency of activities involved in physical international arts projects, by NPO respondents, 2018/19-2021/22	53
Figure 19	Frequency of activities involved in virtual international arts projects, by all respondents, 2018/19-2021/22	54
Figure 20	Frequency of activities involved in virtual international arts projects, by NPO respondents, 2018/19-2021/22	55
Figure 21	Estimated total revenue from international activity* undertaken by all NPOs between 2014/15 and 2021/22, millions (£000,000s)	65
Figure 22	Revenue associated with international activity as a % of annual turnover (internationally active NPOs), 2014/15 – 2021/22	67

Figure 23	Breakdown of reported international revenue of NPOs by income source, 2018/19 and 2021/22	70
Figure 24	Average value of international revenues generated by NPOs, broken down by annual turnover, 2014/15 – 2021/22	72
Figure 25	Average value of international revenues generated by NPOs, broken down by artform, 2014/15 – 2021/22	73
Figure 26	Global regions involved in physical and virtual international activity as % of all international collaborations (all respondents), 2014/15 – 2021/22	79, 82-83
Figure 27	Top 10 countries and territories which were involved in physical and virtual international activity, 2014/15 – 2021/22	84
Figure 28	Top emerging countries and territories for physical activity (% respondents engaging with the country or territory for the first time)*, 2018/19 and 2021/22	85-86
Figure 29	Reported international revenue by associated geographic region, 2018/19 and 2021/22	93
Figure 30	Reported benefits arising from international activity, all respondents between April 2018 – March 2022	103
Figure 31	Reported barriers to international activity, all respondents between April 2018 – March 2022	104
Figure 32	Reported factors which have enabled international activity, all respondents between April 2018 – March 2022	105
Figure 33	Reported factors which would support organisations and practitioners to undertake more international activity in future, all respondents, between April 2018 – March 2022	106
Figure 34	Reported barriers to undertaking international activity among inactive organisations/ professionals, between April 2018 – March 2022	110

Figure 35	Perceived enablers to undertaking international activity among inactive organisations/ professionals, between April 2018 – March 2022	111
Figure 36	International readiness of internationally inactive respondents, 2021	112

Executive Summary

This report outlines the findings from a major study into the international activity of the Arts Council England-supported cultural ecosystem. Arts Council England support organisations and practitioners to realise their international ambitions, both through their National Portfolio and through project-based grants. The study was undertaken by BOP Consulting and market research partners Strategic Research & Insight (SRI) on behalf of Arts Council England.

The research aimed to uncover how widespread international activity is amongst Arts Council-funded organisations and practitioners (National Portfolio Organisations and grant recipients), the scale and financial value of the activity, where and how it takes place, and what impact it has on a range of non-financial outputs. The study follows on from a first survey of the international activity of Arts Council England NPOs that was undertaken in 2014/15.

312 NPOs and 548 grant recipients responded to a survey which asked for data on international activity across two years – a ‘pre-pandemic’ year (2018/19) and a more recent year (2021/22) that charts the later stages of the pandemic. Survey data is accompanied by qualitative insights from a selection of NPOs and cultural organisations who were interviewed as part of the research.

The study found that the pandemic has, unsurprisingly, had a severe impact on the volume of in-person international activity undertaken by arts and cultural practitioners in England, as well as the revenue generated by this activity.

The research also uncovered a less-pronounced pre-pandemic decline in international activity and revenues of NPOs, when compared to 2014/15. Respondents identified a challenging regulatory / trade and financial environment as barriers to international activity between April 2018 and May 2022, and there was little optimism that these barriers will ease in the near future.

However, the findings also show how the cultural sector has adapted to the challenges of the pandemic by significantly increasing the volume of virtual international activity undertaken. In some senses, this has opened up international working – in terms of more smaller organisations being able to take part, but also in terms of a wider range of countries and territories they have connected with.

Despite digital technologies opening up new possibilities to connect globally, the European Union remains the most significant region for the international activity of English arts and cultural organisations. This is the case for both in-person and virtual activity, demonstrating enduring cultural ties with our closest neighbours.

The desire to push artistic boundaries and to exchange with other artists and cultures across the world continues to be the most significant motivators for international activity, highlighting the contribution this activity makes to England's cultural richness.

Finally, the survey shows Arts Council England support is now the most significant enabler in helping organisations and practitioners to stay globally connected.

Headline statistics from the research are summarised below:

International activity: volume and revenues

Even pre-pandemic NPOs were becoming less internationally active as a cohort:

- NPOs undertook fewer in-person projects on average in 2018/19 (an average of 4.3 projects per NPO) than in 2014/15 (an average of 5.3 projects). The proportion of NPOs reporting one or more physical international projects fell from 62% in 2014/15 to 52% in 2018/19.
- Following the onset of the pandemic, just over a third (34%) of NPOs reported undertaking one or more in-person projects. NPOs undertook an average of just 1.8 physical projects in 2021/22.

The pandemic seems to have led to – a ‘squeezed middle’ – a contraction in the proportion of NPOs undertaking neither very small nor very large amounts of in-person activity:

- The proportion of NPOs undertaking between 6-20 projects declined from 25% in 2018/19 to 15% in 21/22.

Similarly, the total revenue related to international activity generated by the NPO portfolio has fallen over time:

- Immediately pre-pandemic, NPOs generated an estimated £41.5m through international activity in 2018/19, down from an estimated £53.8m in 2014/15.
- Total international revenue generated by NPOs further declined to £22.4m by 2021/22, broadly mirroring the estimated fall in the number of physical projects undertaken over the same time period.

¹ National Lottery Project Grant (NLPG) recipients and Developing Your Creative Practice (DYCP) grant recipients

Project grant recipients¹ (many of whom were freelancers) undertook fewer international projects than NPOs and generated less income:

- Grant recipients undertook an average of 1 project per respondent in 2018/19 and just 0.7 projects per respondent in 2021/22.
- The average revenue associated with international work among internationally active Grant recipients was £20,500 in 2018/19 and £20,000 in 2021/22 – significantly less than the £95,000 generated on average by internationally active NPOs in 2018/19 and the £99,000 generated on average by NPOs in 2021/22.

Variation across the sector

Across both years of the study, larger NPOs (as measured by turnover) undertook more physical projects per year than their smaller counterparts and generated more income from international activity.

- There was a relationship between the annual turnover of an NPO and the average number of international in-person projects undertaken in a year, suggesting that those NPOs with greater resources at their disposal also have a greater capacity to undertake international projects.
- Average international revenues of the smallest turnover band were less than £10,000 in both 2018/19 and 2021/22 whereas the average international revenues of the NPOs with the largest turnovers topped £100,000 in 2018/19, falling to just over £85,000 in 2021/22.

However, there has been a sharp decline in the physical activity and revenues of the largest organisations (£2million plus turnover) since 2014/15:

- The average number of physical projects undertaken by £2million plus turnover NPOs almost halved from 14.5 in 2014/15 to 7.4 in 2018/19
- Average international revenues of NPOs with annual turnovers of more than £2million more than halved between 2014/15 and 2018/19

The relationship between an organisation's size and the number of virtual projects undertaken was weaker than for physical projects:

- In 2021/22, while organisations with a turnover of more than £2million undertook the highest number of virtual projects on average (11.6 projects), the second highest average of virtual projects was carried out by organisations with a turnover of less than £300k.
- Financial resource may be less of a consideration when undertaking international activity virtually than it is for physical activity.

Profitability

International activity generated a modest net financial contribution to the NPOs who took part, although this actually increased post-pandemic:

- For NPOs, international activity contributed an average income net of costs of £3,071 in 2018/19, rising to £8,141 in 2021/22.
- Despite an average net profit, international activity was cost neutral for 58% NPOs in 2018/19 and 21% NPOs in 2021/22.
- The net balance of NPOs generating profit from international activity increased from 12% in 2018/19 to 23% in 2021/22, perhaps indicative of greater risk aversion in relation to international activity following the onset of the pandemic.

Geography of international activity

The European Union remains the most significant region for the international activity of English arts and cultural organisations and practitioners post-Brexit, although qualitative evidence suggests opportunities to partner with the EU may be decreasing:

- A majority of in-person collaborations involved the European Union (EU), followed by North American countries.
- Nearly three quarters of reported international revenues were generated from countries within the EU and North America.
- Qualitative data points to decreasing levels of funding available to support collaboration opportunities in these two regions following the UK's exit from Creative Europe and increasing complexity of North American funding requirements.

The geography of arts organisations' virtual international activity is more widely dispersed than for physical activities:

- In 2021/22, when the bulk of virtual activity was reported to have taken place, Asia, rather than North America, was the second most frequently reported region, representing 21% of all virtual activity.
- 10% of virtual collaborations over this year involved countries in Africa (excluding Arab states), compared with 4% of physical activity. Latin America and the Caribbean and the Arab States also saw an increase in the share of activity when compared with physical projects.

Benefits, barriers and enablers

While the reported benefits arising from international are unchanged since 2014/15, the barriers and enablers reported by arts organisations and professionals have shifted over time:

- As in 2014/15, ‘artistic and professional development’ and ‘knowledge exchange and collaboration’ were the two most commonly reported benefits from international activity
- Pandemic restrictions were the most frequently cited barrier which prevented internationally active respondents from undertaking international activity between April 2018 and March 2022. Visas and work permits rose from the seventh most commonly cited barrier in 2014/15 to the third most commonly reported, suggesting the salience of this issue has increased.
- Across all respondents, Arts Council England financial support was identified as the most significant enabling factor in helping them engage in international activity – up from the fifth most commonly reported enablers in 2014/15.

Brexit has aggravated some barriers to English arts organisations international activities:

- 91% of respondents who identified customs and cabotage issues as barriers to international activity, and 83% of respondents who identified visas and work permits as a barrier said that Brexit was a contributory factor.

A significant proportion of internationally inactive respondents are planning future international activity – although levels of international readiness are generally low among this group:

- 45% of internationally inactive respondents said they planned to undertake physical international activity in the future.
- Over half (58% or 274 respondents) of this cohort showed low levels of international readiness. However, 12% (57 respondents) showed high or very high international readiness.



(c) Volker Beushausen – The Welcoming Party (Theatre-Rites production, co-production with Manchester International Festival, Z-arts and the Ruhrtriennale Festival), 2019

1 Introduction

1.1 International cultural activity

Artists and audiences exist in a globalised world. Culture grows out of, reflects, and helps to make sense of that world, whilst international exchange inspires artistic creation and facilitates communication across borders.

International cultural activity enhances the creative quality of England's cultural offering, develops the capacity of its creative workforce, and contributes to the financial sustainability of cultural organisations.

For organisations and practitioners, there is evidence of a wide range of outcomes arising from their participation, including artistic development, and increased technical skills and knowledge; increased quality and diversity of creative outputs; stronger connections and larger professional networks and career opportunities and progressions².

International activity can also lead to economic outcomes, such as inward investment in England's creative sector. Over the long-term, international cultural exchange makes England a more attractive place to visit, to collaborate with and to do business with³.

However, the current environment for cultural organisations and practitioners is increasingly complex to navigate. The Covid-19 pandemic, new relationships with the European Union and ambitions for Net Zero are all changing the ways the culture sector in England approaches and understands international cultural activity.

² Supporting evidence for these outcomes is covered in a Literature review into International cultural activity, submitted by BOP Consulting to Arts Council England, July 2022

³ British Council (2020) The Sources of Soft Power.

1.1.1 Arts Council England support for international working

Arts Council England's Let's Create strategy recognises the major social, cultural, and economic value international activity adds to the country, its communities, and its creative sector. The ten-year initiative seeks to strengthen England's cultural sector to be innovative, collaborative, and international, guaranteeing 'great art and culture for everyone'.

Arts Council England support a nationwide ecology of cultural organisations and practitioners to actualise their international ambitions, both through their national portfolio and through project-based grants.

This study examines the international working experiences and attitudes of:

- **National Portfolio Organisations (NPOs)**
A national portfolio of 807 arts organisations supported directly by Arts Council England over a three-year basis, representing a total investment of £1.5 billion.
- **National Lottery Project Grant (NLPG) recipients**
Project based grant funding between £1,00 and £100,000 which supports the work of individual practitioners, communities, and cultural organisations to cultivate cultural communities and a creative country.
- **Developing Your Creative Practice (DYCP) grant recipients**
A programme supporting the development of independent cultural and creative practitioners with grant funding between £2,000 and £10,000. It encourages career progression through research and creativity enabling practitioners to access more opportunities, within the UK and overseas.

1.2 This research

BOP Consulting were commissioned by Arts Council England in April 2022 to establish the level of international activity conducted by Arts Council England supported organisations and individuals, including NPOs and the recipients of NLPG and DYCP grants.

International activity is defined as the exchange of arts and cultural activity - which include but are not limited to, touring, residencies, digital showcasing, and networking - or goods - which include but are not limited to, exhibitions, business models, cultural skills, and knowledge - between English organisations or individuals and those based across borders.

The study aims to:

- consider how widespread international activity is amongst Arts Council-funded organisations and practitioners, the scale of this activity and where and how it takes place – and how this varies
- assess what impact international activity had on a range of financial and non-financial outputs.

In order to also understand the impact of Covid-19, data for the study is taken across two periods - a 'pre-pandemic' year (2018/19) and a year following the onset of the pandemic (2021/22).

The research also builds on a baseline study on the international activities of NPOs in 2014/15⁴, this time widening in scope to understand activities undertaken by grant recipients as well as NPOs.

Underpinning this report are two additional documents: a literature review into the outcomes, barriers and enablers of international cultural activity undertaken by BOP Consulting for Arts Council England in July 2022, and survey data tables presented in an accessible format.

⁴ TBR (2016), International Activity of arts and cultural organisations in 2014-15. https://www.artscouncil.org.uk/sites/default/files/download-file/International_activity_arts_cultural_organisations_final_report.pdf

1.3 Methodology

Evidence was gathered using a mixed methods approach and comprised of quantitative and qualitative strands:

Dual approach quantitative research strand (telephone and online survey)

A survey aimed at assessing impact of international activity amongst the Arts Council England-supported ecology in the two data collection periods (financial years 2018/19 and 2021/22).

The survey was designed to include common indicators from the 2014/15 baseline survey assessing the volume, value, and location of international activity. It also included the addition of new indicators that interrogate the impact of Covid, Brexit and Net-Zero, as well as international readiness and first-time activity.

It was administered in two different ways:

- A Computer Assisted Telephone Interview (CATI) survey managed by our research partners, Strategic Research & Insight (SRI), carried out between 18 July 2022 and 26 September 2022. The National Portfolio 2018-2022 (n= 807) were invited to participate in the telephone survey. Of these, 312 total telephone interviews were completed.
- An online survey covering the same questions, which was undertaken by NLPG & DYCP grant recipients. This cohort includes both organisations and freelance practitioners. It was also managed by SRI and ran between 24 August 2022 and 21 September 2022. In total, 4,858 NLPG & DYCP grant recipients were invited to participate in the online survey. Of these, 548 respondents completed the survey.

Qualitative research strand:

Survey results are contextualised with qualitative data conducted through:

- **Case studies:** Case studies on international working from twelve supported organisations. These entailed interviews with project leads to provide detail evidence on how outcomes have been realised, as well as identifying enablers and barriers to international activity. To cover a selection of ACE funded recipients, organisations were selected based on their geographical location and art form.
- **In depth interviews:** Six in-depth interviews to conceptualise the findings of the CATI and online surveys. These included interviews with project leads to provide evidence on the attitudes towards international working. Organisations were considered based their international activity experiences, as well as their geographical location and art form.

Other methodological notes:

- **Sample confidence:** At cohort level (i.e. for the NPO cohort and grant recipient cohort), we can be confident that the data is broadly representative of the population⁵ at a 95% confidence level⁶.
- To understand variance (including across artforms, organisation sizes and English regions), we have also undertaken analysis looking at different groups within the sample. It should be noted that the levels of statistical reliability decrease where the population is broken down into smaller groups. Full respondent profiles can be found in Section 2.

⁵ With a sample size of 312 NPOs from a total population of 807 NPOs, our data for this cohort has a confidence interval of 4.3%. For the grant recipient cohort (4,858), which produced 548 respondents, our data has a confidence interval of 3.9%

⁶ Tests of statistical reliability are provided at 95% confidence levels. Thus, we can be certain, that 95% of the time, the responses provided by the respondents will reflect those of the whole population, plus or minus the confidence interval.

- **Respondent cohorts:** While some analysis looks at data from the entire respondent cohort (NPOs and grant recipients), in other sections we have separated these two groups, both to understand how their experiences may differ but also to allow comparability with NPO data from 2014/15.
In other sections, we look at internationally ‘active’ and ‘inactive’ respondents (i.e. those who reported undertaking international activity within the data collection period and those who did not) to understand the different barriers and enablers for these groups.
- **Grossing up:** Throughout most of this report, the results presented relate to the survey sample for the sake of statistical reliability. However, on two occasions we have grossed up from the survey sample, using weighted averages, to provide estimates for the entire NPO population. This is in order to generate data that is comparable with some of the 2014/15 NPO data, as the two studies have different sample sizes. The two occasions where grossing up has been used to provide estimates relate to (i) the total number of projects undertaken by NPOs (Section 3.2.1); and (ii) the total value of international revenue generated by NPOs (4.1.1).
- **Physical and virtual activity:** Throughout the report we refer to both physical and virtual international activity. Physical or ‘in-person’ activity is defined as activity that involved the physical movement of people, work, collections, or products across borders, and virtual or ‘online’ activity, defined as international projects or activities that did not involve the physical movement of people, work, collections or products.





2 Respondent profiles

2.1 Survey respondent profiles (all)

Figure 1 and Figure 2 compare the artform and English region of all survey respondents against the wider Arts Council England-supported population, defined here as those in receipt of NPO funding or National Lottery Project Grants recipients (NLPG) and Developing Your Creative Practice grants (DYCP).

Figure 1

Breakdown of survey respondents by artform, compared with population of ACE-supported organisations and practitioners

Artform	Number of respondents	% of respondents	ACE supported population	% of ACE supported population	% of ACE supported population surveyed
Visual arts	205	29%	1,457	26%	14%
Theatre	124	18%	1,125	20%	11%
Combined arts	106	15%	1,104	19%	10%
Music	94	13%	777	14%	12%
Literature	87	12%	596	11%	15%
Dance	39	6%	391	7%	10%
Museums	30	4%	105	2%	29%
Not discipline specific	16	2%	97	2%	16%
Libraries	5	1%	13	0%	38%
Total	706	100%	5,665	100%	12%

Source: BOP Consulting 2022 Ref S1/ Table 1b

Figure 2
Breakdown of survey respondents by region, compared with population of ACE-supported organisations and practitioners

English region	Number of respondents	% of respondents	ACE supported population	% of ACE supported population	% of ACE supported population surveyed
North	220	27%	1,427	25%	15%
London	201	25%	1,528	27%	13%
Midlands	118	15%	1,124	20%	10%
South West	116	14%	835	15%	14%
South East	158	19%	752	13%	21%
Total	813	100%	5,666	100%	14%

Source: BOP Consulting 2022 Ref S1/ Table 2b

2.2 NPO respondents

NPO survey respondent profiles are presented as a percentage of the total population: the 807 organisations which comprise the Arts Council England National Portfolio 2018 – 2022. English region and artform is consistent among this group across the 2018 – 2022 Investment programme.

NPO survey respondent turnover and FTEs are presented in relation to data from the Arts Council England Annual Data Survey 2018/19. These data were available for 742 NPOs. At the time of writing, annual data on turnover and FTEs of NPOs in 2021/22 was not available.

Figure 3**Breakdown of NPO survey respondents by artform, compared with population of ACE NPOs, 2018/19**

Artform	Number of NPO respondents	% of NPO respondents	Population of NPOs (18/19)	% of NPO population (18/19)	% of 18/19 NPO population surveyed
Theatre	78	25%	179	22%	44%
Combined arts	75	24%	183	23%	41%
Visual arts	45	14%	140	17%	32%
Music	33	11%	98	12%	34%
Dance	26	8%	68	8%	38%
Museums	26	8%	60	7%	43%
Literature	17	5%	47	6%	36%
Not discipline specific	8	3%	25	3%	32%
Libraries	4	1%	7	1%	57%
Total	312	100%	807	100%	39%

Source: BOP Consulting 2022 Ref S1/ Table 1a

Figure 4

Breakdown of NPO survey respondents by English region, compared with population of ACE NPOs, 2018/19

English region	Number of NPO respondents	% of NPO respondents	Population of NPOs (18/19)	% of NPO population (18/19)	% of 18/19 NPO population surveyed
North	94	30%	225	28%	42%
London	92	29%	257	32%	36%
Midlands	48	15%	126	16%	38%
South West	42	13%	100	12%	42%
South East	36	12%	99	12%	36%
Total	312	100%	807	100%	39%

Source: BOP Consulting 2022 Ref S1/ Table 2a

Figure 5

Breakdown of NPO survey respondents by number of Full Time Equivalent staff (FTEs), compared with population of ACE NPOs, 2018/19

FTEs 18/19	Number of NPO respondents	% of NPO respondents	Population of NPOs (18/19)	% of NPO population (18/19)	% of 18/19 NPO population surveyed
0-5	187	65%	407	55%	46%
6-20	66	23%	192	26%	34%
21-50	19	7%	79	11%	24%
51-100	13	5%	40	5%	33%
101-250	3	1%	19	3%	16%
250+	0	0%	5	1%	0%
Total	288	100%	742	92%	39%

Source BOP Consulting 2022 Ref S1/ Table 3a / ACE Annual Data Survey 2018/19

Figure 6**Breakdown of NPO survey respondents by annual turnover, compared with population of ACE NPOs, 2018/19**

Turnover 18/19	Number of NPO respondents	% of NPO respondents	Population of NPOs (18/19)	% of NPO population (18/19)	% of 18/19 NPO population surveyed
£0 - <£300k	77	27%	178	24%	43%
£300k-<£600k	87	30%	188	25%	46%
£600k-<£1m	46	16%	104	14%	44%
£1m-£2m	26	9%	90	12%	29%
£2m+	52	18%	182	25%	29%
Total	288	100%	742	100%	39%

Source: BOP Consulting 2022 Ref S1/ Table 4a / ACE Annual Data Survey 2018/19

2.3 Grant recipient respondent profiles

Grant recipients are defined here as recipients of National Lottery Project Grants (NLPG) and Developing Your Creative Practice (DYCP) grants. Unlike the NPO cohort, where respondents completed the survey on behalf of their organisation, some grant recipients responded as individual practitioners or freelancers.

Figure 7**Employment status of grant recipient respondent cohort**

Employment status	Count	Percent
Freelance	436	80%
Employee	106	20%
Total	542	100%

Source: BOP Consulting 2022 Ref S1/ Table 3b



(c) Mike Kwasniak – Gecko The Wedding, Pulse Festival, Ipswich – June 2016

3 Volume and type of international activity

This section outlines the volume of international activity undertaken by survey respondents as well as the types of activity undertaken.

It covers both:

- physical or ‘in-person’ international activity, defined as activity that involved the physical movement of people, work, collections or products across borders, and;
- Virtual or ‘online’ activity, defined as international projects or activities that **did not involve** the physical movement of people, work, collections or products.

The survey asked respondents to report the number of international projects they had undertaken each year. Due to the wide range of international activity conducted by arts and cultural organisations and practitioners, respondents were able to define what constituted a ‘project’ in the context of their work.

As such, data on the number of projects undertaken do not reflect the depth, time commitment or monetary value of the reported activity. However, the following section (4) looks at the revenues and expenditure associated with international work as another measure of this activity.

3.1 Volume of activity

The number of physical international projects reported declined sharply following the onset of the pandemic.

Across all survey respondents, the **total reported number of international projects** that involved the physical movement of people, objects, or collections **more than halved from 2018/19 to 2021/22**, falling by 51% from 1,819 to 889.

⁷ BOP Consulting 2022 Ref S2/ Table 1a. Estimates based on total number of international projects reported in survey extrapolated to entire NPO population using weighted averages.

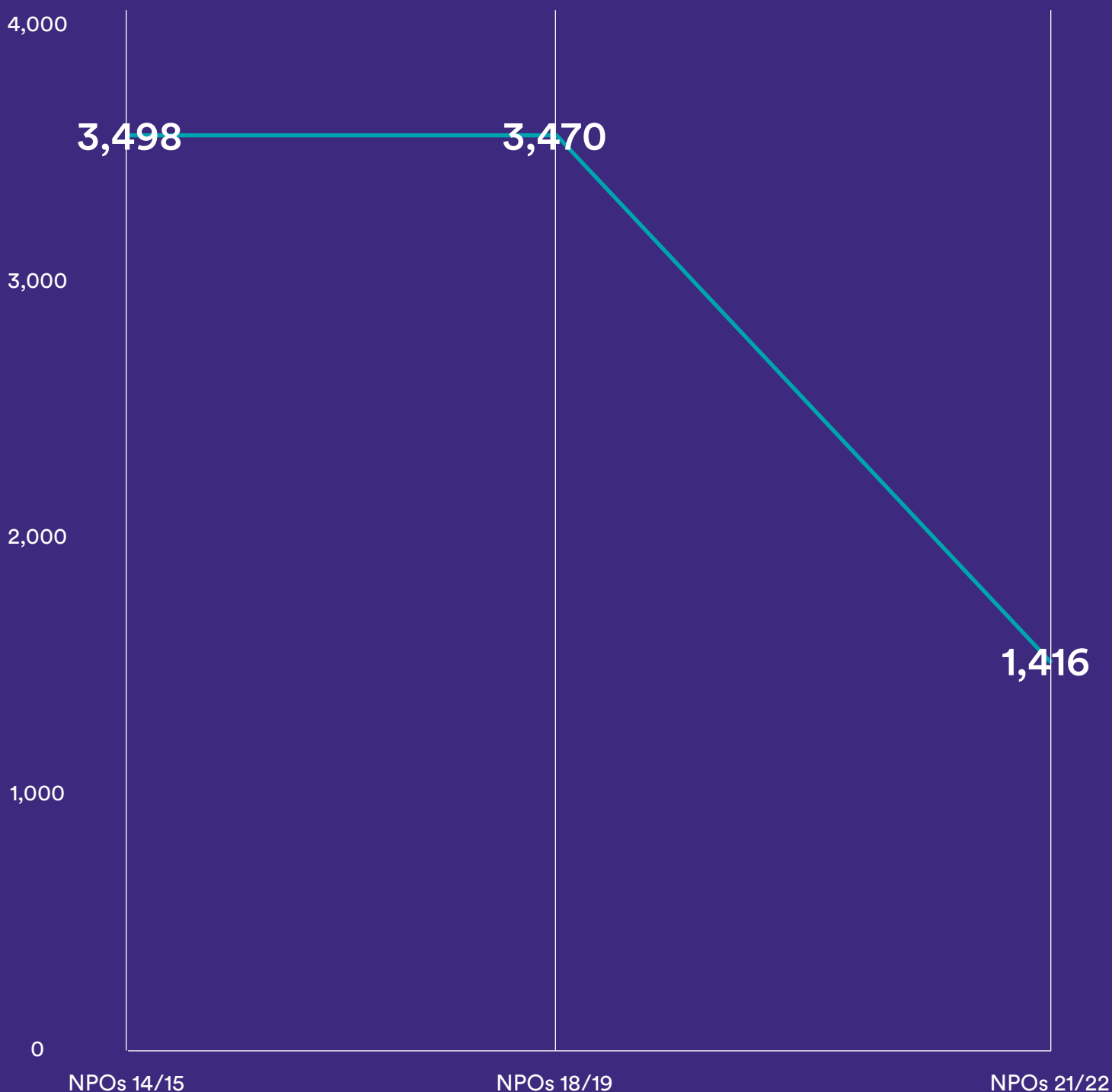
3.1.1 International activity of NPOs: physical projects

By grossing up the number of projects reported by NPOs in the survey to the entire NPO population, we found that the NPO portfolio undertook an estimated **3,470 physical international projects⁷ in 2018/19**. Estimates for 2021/22, following the onset of the pandemic are less than half, at just **1,420 projects** (see Figure 9).

Using the same methodology, we estimate that in 2014/15, NPOs undertook 3,500 projects in total. While this figure is only marginally greater than 2018/19 estimates, over this period Arts Council England's NPO portfolio increased in size from 660 NPOs in 2014/15 to 807 NPOs in 2018/19.

Figure 8

Estimated total number of physical international projects* undertaken by NPOs between 2014/15 and 2021/22



Source: BOP Consulting 2022 Ref S2/ Table 1a * Survey results extrapolated to NPO population (2014/15 NPO population n=660, 2018 – 2022 NPO population n=807)

NPOs were less internationally active in 2018/19 than in 2014/15 and undertook fewer projects on average.

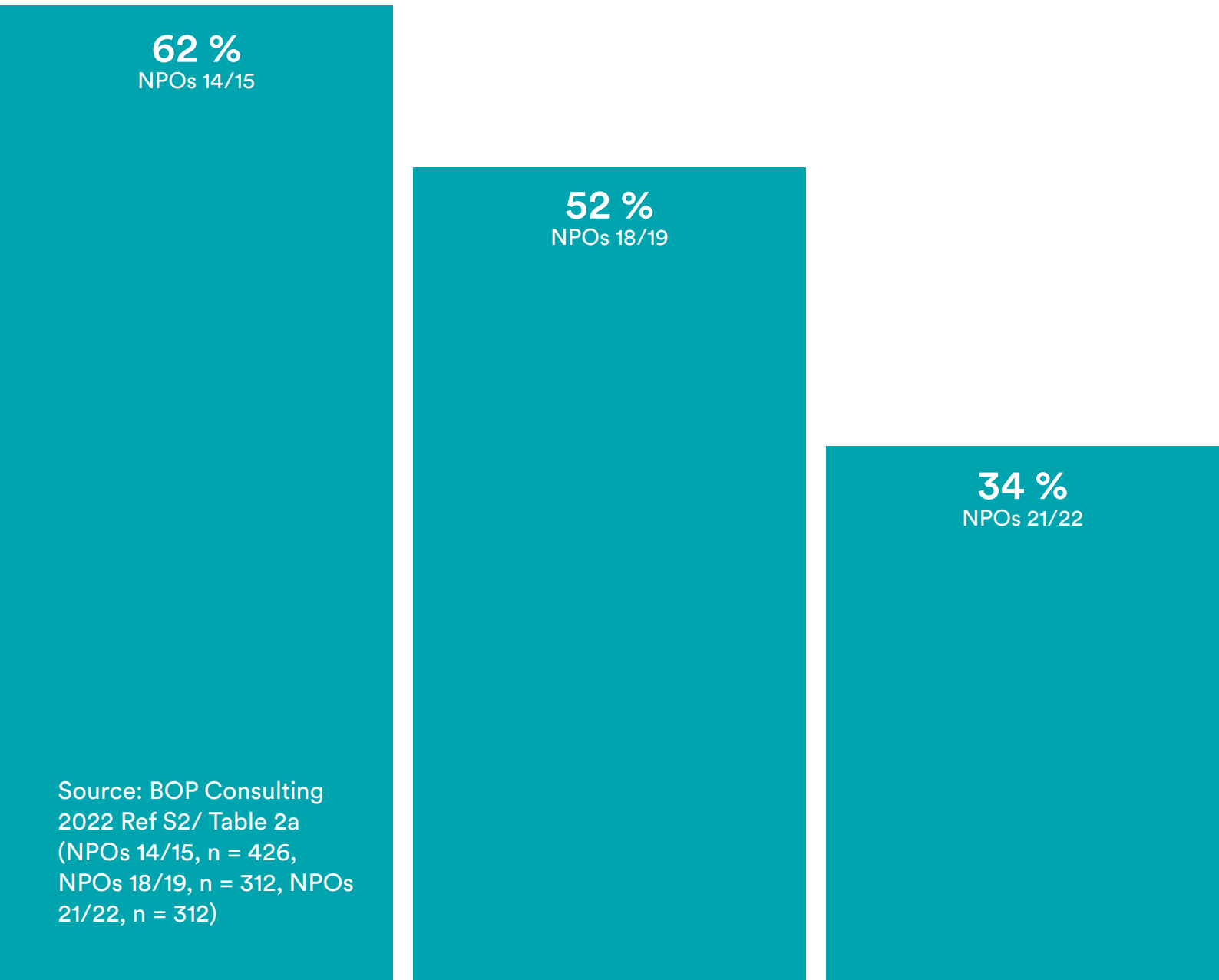
The weighted average number of physical projects undertaken by NPOs fell from 5.3 in 2014/15 to 4.3 in 2018/19, falling again to 1.8 projects per NPO in 2021/22⁸.

The proportion of NPOs reporting one or more international projects within the 12-month data collection period fell from 62% in 2014/15 to 52% in 2018/19. This was followed by a further fall in 2021/22, in which only just over a third (34%) of NPOs reported undertaking one or more international projects (see Figure 10).

⁸ BOP Consulting 2022 Ref S2/ Table 1b. Weighted averages calculated by organisation turnover.

Figure 9

Percent of NPOs reporting one or more physical international projects between 2014/15 and 2021/22



62 %
NPOs 14/15

52 %
NPOs 18/19

34 %
NPOs 21/22

Source: BOP Consulting
2022 Ref S2/ Table 2a
(NPOs 14/15, n = 426,
NPOs 18/19, n = 312, NPOs
21/22, n = 312)

Across all data collection periods, a majority of NPOs who undertook international activity reported between one and five physical projects.

In 2021/22, the proportion of NPOs undertaking 1 - 5 projects rose from 69% to 80%, representing four fifths of all internationally active NPOs, coupled with a decline from 25% to 15% for the proportion of NPOs undertaking between 6 - 20 projects.

This could indicate that a ‘middling’ level of international activity – perhaps undertaken by organisations who had been developing their level of international activity beyond a small number of projects, but who were not yet undertaking large volumes of international work - became more difficult to sustain following the pandemic.

Figure 10

Number of physical projects reported by internationally active NPOs, 2014/15 – 2021/22

Number of projects reported	Count NPOs 2014/15	% NPOs 2014/15	Count NPOs 2018/19	% NPOs 2018/19	Count NPOs 2021/22	% NPOs 2021/22
1 - 5	177	67%	113	69%	84	80%
6 - 20	69	26%	40	25%	16	15%
21 - 49	12	5%	6	4%	4	4%
50 +	7	3%	4	2%	1	1%
Total	265	100%	163	100%	105	100%

Source: BOP Consulting 2022 Ref S2/ Table 1d

3.1.2 International activity of grant recipients: physical projects

The total number of projects reported by survey respondents who received DYCP or NLPG grants was 559 in 2018/19 and 358 in 2021/22⁹. Grant recipients undertook fewer projects on average than NPOs, with an average of 1.0 project per respondent in 2018/19 and just 0.7 projects per respondent in 2021/22.

Unlike NPOs, the proportion of grant recipients who undertook at least one international physical project stayed the same across both data collection periods: internationally-active respondents made up 25% of the total grant recipient respondent cohort in both years.

3.1.3 International activity: virtual projects

While physical activity declined following the onset of the pandemic, the number of online projects reported more than trebled between 2018/19 and 2021/22.

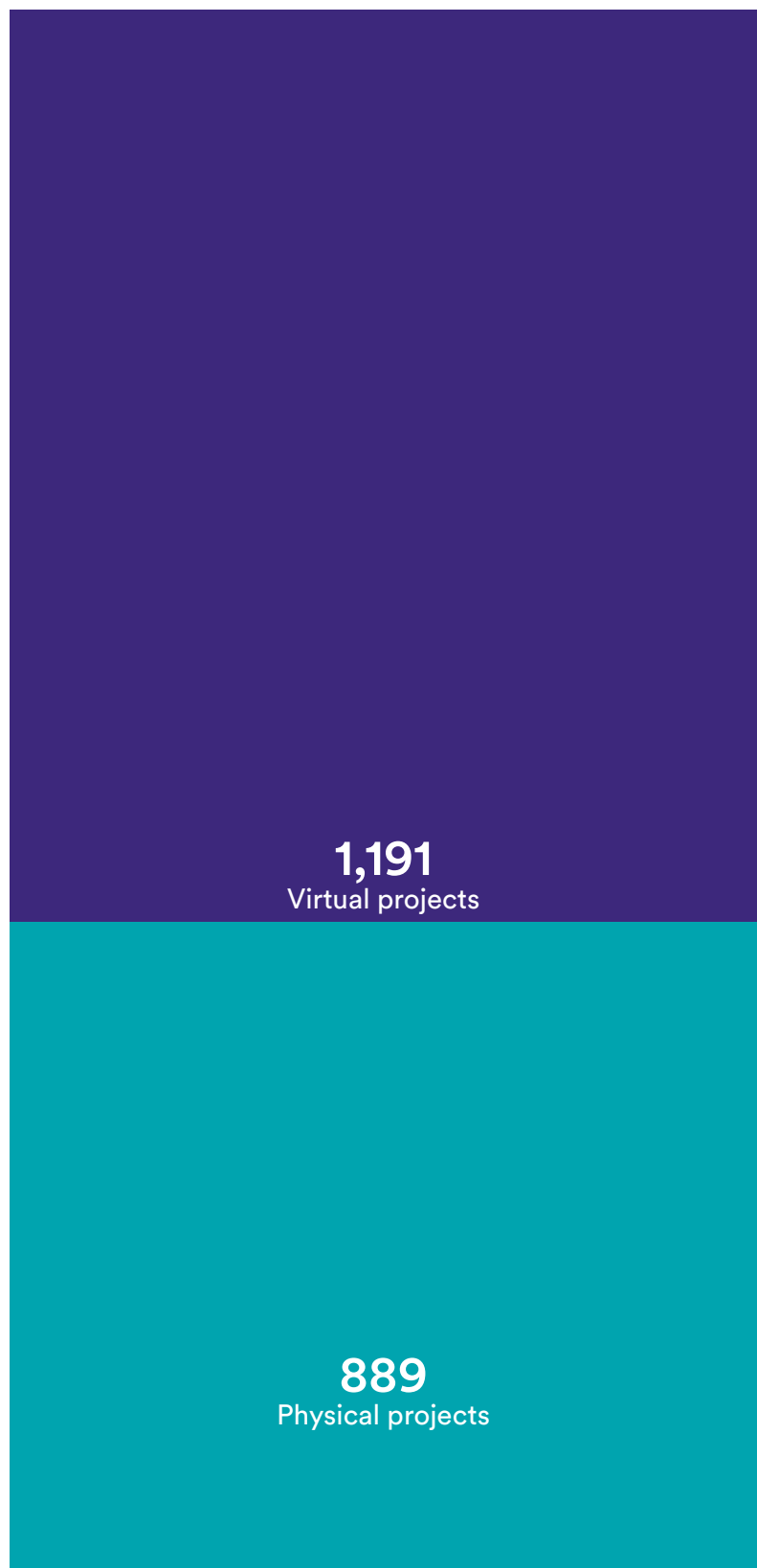
Once virtual or online international activity is also considered, the sharp decline in international activity that is observable when looking at physical projects alone begins to look quite different. The **total number of virtual projects** reported across all respondents (NPOs and grant recipients) **rose from 328 in 2018/19 to 1,191 in 2021/22**.

⁹ BOP Consulting 2022 Ref S2/ Table 1a. Figures as reported not extrapolated to population to maintain statistical reliability.

Figure 11a
Total number of physical and
virtual international projects
reported across all respondents,
2018/19



Figure 11b
Total number of physical and
virtual international projects
reported across all respondents,
2021/22



This significant uptick in virtual activity brings **the total number of reported projects (physical *and* virtual) in 2021/22 to 2,080** – just 60 fewer projects than the total number of physical and virtual projects reported in 2018/19.

The **proportion of NPOs who reported undertaking one or more virtual projects in 2021/22 was 43%** (greater than the proportion who undertook physical activity in this period), and up from **just 15% who undertook virtual international projects in 2018/19**. Similarly, 17% of all grant recipients said they carried out one or more virtual international project in 2021/22, up from 9% in 2018/19.

As with physical projects, a majority of NPOs that undertook virtual international activity carried out between one and five projects, with a small minority (4% in 2018/19 and 8% in 2021/22) engaged in more than twenty virtual projects in one year.

Figure 12

Number of virtual projects reported by internationally active NPOs, 2018/19 and 2021/22

Number of projects reported	Count NPOs 2018/19	% NPOs 2018/19	Count NPOs 2021/22	% NPOs 2021/22
1 - 5	36	78%	106	79%
6 - 20	8	17%	18	13%
21 - 49	2	4%	7	5%
50 +	0	0%	4	3%
Total	46	100%	135	100%

Source: BOP Consulting 2022 Ref S2/ Table 1e

This is evidence that cultural organisations and practitioners in the ACE-support cultural ecosystem found new ways to create and maintain international connections amid the pandemic, through the use of digital technologies – collaborating and sharing their work despite barriers to physical travel and activity.

This is supported by the qualitative research, which found that virtual projects were a natural progression for organisations to maintain programming and engagement with their audiences during the pandemic. Across the period, all organisations undertook online activities to some extent, and there was a significant increase in such activities, both domestically and internationally, particularly after 2019. They report developing an increased understanding of digital technologies and used these to resume programming.

Extraordinary Wall of Silence

Ad Infinitum Productions

Extraordinary Wall of Silence was a collaboration between an ensemble of Deaf and hearing actors to create a production exploring Deaf culture, history, and the oppression of Deafness. The production was co-commissioned by HOME, Birmingham Hippodrome, Bristol Old Vic, Newbury Corn Exchange, In Good Company and in association with Salisbury Playhouse.

Although originally intended to be showcased at a disability festival in Hong Kong, the pandemic meant this could not go ahead. They instead received additional funds from the festival to produce a high-quality film which was showcased in lieu of the live performance

The film provided an opportunity for the organisation to internationally promote their work. Going forward, this is something Ad Infinitum Productions are embracing and considering as part of their business model, acknowledging that digital art is not merely a reproduction or imitation of a live theatre experience. Rather, they aim to create a unique and captivating experience that stands on its own.

“It’s not about trying to capture a theatre show but about making something that embraces digital genres as an exciting and impactful artform in its own right.”



Writing for Inclusion

Disability Arts Online

“ACE are our main funders and being an NPO is important for our reputation.”

Without core funding from ACE, Disability Arts Online, who are dependent on project funding for their international work, would not have had the necessary resources to take on important projects such as Writing for Inclusion.

The 2021 project involved a training program for 16 Indonesian journalists, half of whom were from mainstream backgrounds and the other half were aspiring journalists who identified as disabled. Disability Arts Online were commissioned by British Council Indonesia to develop and deliver the training programme which sought to change how disability was presented in Indonesia.

“The project was close to our ethos of supporting disabled artists in transformative ways.”

The delivery of the project was exclusively online as it took place during the height of the pandemic. While they experienced challenges around language barriers, the digitisation of the project enabled a greater reach of participants, aligning with the wider aims of increasing the involvement of journalists outside of urban areas, particularly Jakarta.

The project reaffirmed the value of international work for Disability Arts Online, and whilst the majority of their work will continue to take place in the UK, they are working to integrate this type of programme development and delivery into a consultancy menu, to better leverage international opportunities.



3.2 Variance in volume of projects undertaken

3.2.1 Variance by size

Larger NPOs undertook more physical projects per year than their smaller counterparts

The data shows a relationship between the size of an NPO (as measured by annual turnover) and the average number of international projects undertaken in a year. Across all three data collection periods, organisations with a turnover of £1million or more undertook more projects on average than those with smaller annual incomes, suggesting that those NPOs with greater resources at their disposal also have a greater capacity to undertake international projects.

Noticeably, the average number of projects undertaken by the largest turnover band (£2million plus) almost halved from 14.5 in 2014/15 to 7.4 in 2018/19.

Figure 13

Average number of physical projects undertaken by NPOs, by turnover, 2014/15-2021/22

Turnover	NPOs 2014/15	NPOs 2018/19	NPOs 2021/22
£0 - <£300k	2.2	1.9	1.0
£300k-<£600k	3.1	3.7	1.1
£600k-<£1m	4.3	2.5	2.1
£1m-£2m	6.1	4.5	4.7
£2m+	14.5	7.4	3.2

Source: BOP Consulting 2022 Ref S2/ Table 1b

Looking at the number of virtual projects undertaken by different sized NPOs, there does not appear to be the same relationship between organisational size and the number of international projects undertaken.

For example, in 2021/22, while organisations with a turnover of more than £2million undertook the highest number of virtual projects on average (11.6 projects), the second highest average of virtual projects was carried out by organisations with a turnover that was less than £300k.

This suggests that access to financial resource may be less of a consideration when undertaking international activity virtually than it is for physical activity.

In interviews, organisations said that collaborations which were flexible in their nature, geographic reach and environmental impact were key motivators in driving their ambitions to undertake digital international activities.

“We’re able to achieve more against some key objectives with online activity. We’re engaging with countries we previously couldn’t have afforded to [...] at the same time we’re creating longer lasting connections.”

Chris Gribble, National Centre for Writing

Figure 14**Average number of virtual projects undertaken by NPOs, by turnover, 2018/19-2021/22**

Turnover	NPOs 2018/19	NPOs 2021/22
£0 - <£300k	6.3	8.7
£300k-<£600k	6.2	4.7
£600k-<£1m	5.8	7.2
£1m-£2m	1.3	4.4
£2m+	2.1	11.6

Source: BOP Consulting 2022 Ref S2/ Table 1c

3.2.2 Variance by artform and English region

Among NPOs, visual arts, music, and organisations that were not discipline specific were the most likely to have been internationally active (carrying out one or more physical projects) in both 2018/19 and 2021/22.

This changes when looking across the whole Arts Council England supported ecosystem, which includes individual practitioners as well as organisations. In 2018/19, dance, combined arts and not discipline specific respondents were the most likely to have undertaken international activity. In 2021/22, visual arts, dance and not artform specific respondents were the three most internationally active artforms¹⁰.

¹⁰ Samples sizes for different artforms within the wider ACE-supported cohort (i.e. grant recipients) are less statistically robust than NPO artform cohorts

Figure 15

Proportion of internationally active respondents (reporting one or more physical projects within a year) by artform, NPOs and All, 2014/15 - 2021/22

NPOs 14/15		NPOs 18/19		All 18/19	
Dance	76%	Music	65%	Not artform specific	50%
Visual arts	72%	Visual arts	64%	Dance	49%
Not artform specific	71%	Not artform specific	63%	Combined arts	45%
Literature	68%	Dance	58%	Museums	43%
Music	59%	Combined arts	52%	Theatre	39%
Theatre	57%	Museums	50%	Music	38%
Combined arts	56%	Theatre	47%	Visual arts	36%
Museums	NA	Literature	47%	Literature	22%
NPOs 21/22		All 21/22			
Visual arts	53%	Not artform specific	50%		
Not artform specific	50%	Visual arts	36%		
Music	42%	Dance	33%		
Literature	35%	Museums	30%		
Dance	35%	Combined arts	29%		
Combined arts	33%	Music	29%		
Museums	27%	Literature	24%		
Theatre	24%	Theatre	22%		

Source: BOP Consulting 2022 Ref S2/ Table 2a. Museum data was not available for 2014/15. Libraries were excluded from this analysis due to small sample size (n=5).

NPOs from the Midlands had the highest likelihood of undertaking international activity in both 2018/19 and 2021/22, whereas NPOs from the South West were least likely to engage in this activity across both data collection periods.

Looking across all survey respondents (NPOs and grant recipients), London overtakes the Midlands as the English region with the highest levels of activity.

Figure 16

Proportion of internationally active respondents (reporting one or more physical projects within a year) by English region, NPOs and All, 2018/19 - 2021/22

NPOs 18/19		All 18/19	
Midlands	67%	London	41%
North	53%	Midlands	37%
London	52%	North	37%
South East	44%	South West	28%
South West	40%	South East	25%

NPOs 18/19		All 21/22	
Midlands	46%	London	32%
South East	39%	Midlands	28%
London	36%	North	27%
North	29%	South West	27%
South West	21%	South East	25%

Source: Source: BOP Consulting 2022 Ref S2/ Table 2b. 2014/15 NPO data was not available for comparison.

3.3 Type of activity undertaken

Figure 18 and Figure 19 show the wide range of physical activity undertaken by cultural organisations and practitioners.

Participating in or facilitating international knowledge exchange was the most reported type of physical international activity across all respondents and both data collection periods.

“The partnership between British Ceramics Biennial and Indian Ceramics Triennale embodies everything we love about international work. This includes cross cultural relationships, the international exchange of culture and ideas, artists development, localised community engagement and a meaningful programme of events.”

Rhiannon Ewing James, British Ceramics Biennial

In the qualitative research, organisations provided examples of the ways in which sharing expertise had advanced and evolved their practice. They reported that projects enabled them to apply new learning from partner organisations and collaborations to their internal processes and artistic development. Additionally, it enhanced the quality of their practice as they gained new ideas, skills and perspectives that enriched the artistic and cultural experience for their audience.

Activities that are more artform specialist, such as loaning or borrowing objects for display or exhibition, were reported least frequently. During interviews, one museum expressed that capacity constraints were a significant factor, along with increasing transportation and insurance costs, contributing to the challenges they face. Nevertheless, they consider international activity more crucial than ever, believing that the UK must be more visible in its cross-cultural exchange.

International knowledge exchange was also the most reported virtual activity across both 2018/19 and 2021/22, followed by co-produced or co-commissioned activity (see Figure 20 and Figure 21).

Figure 17
Frequency of activities involved in physical international arts projects, by all respondents, 2018/19-2021/22

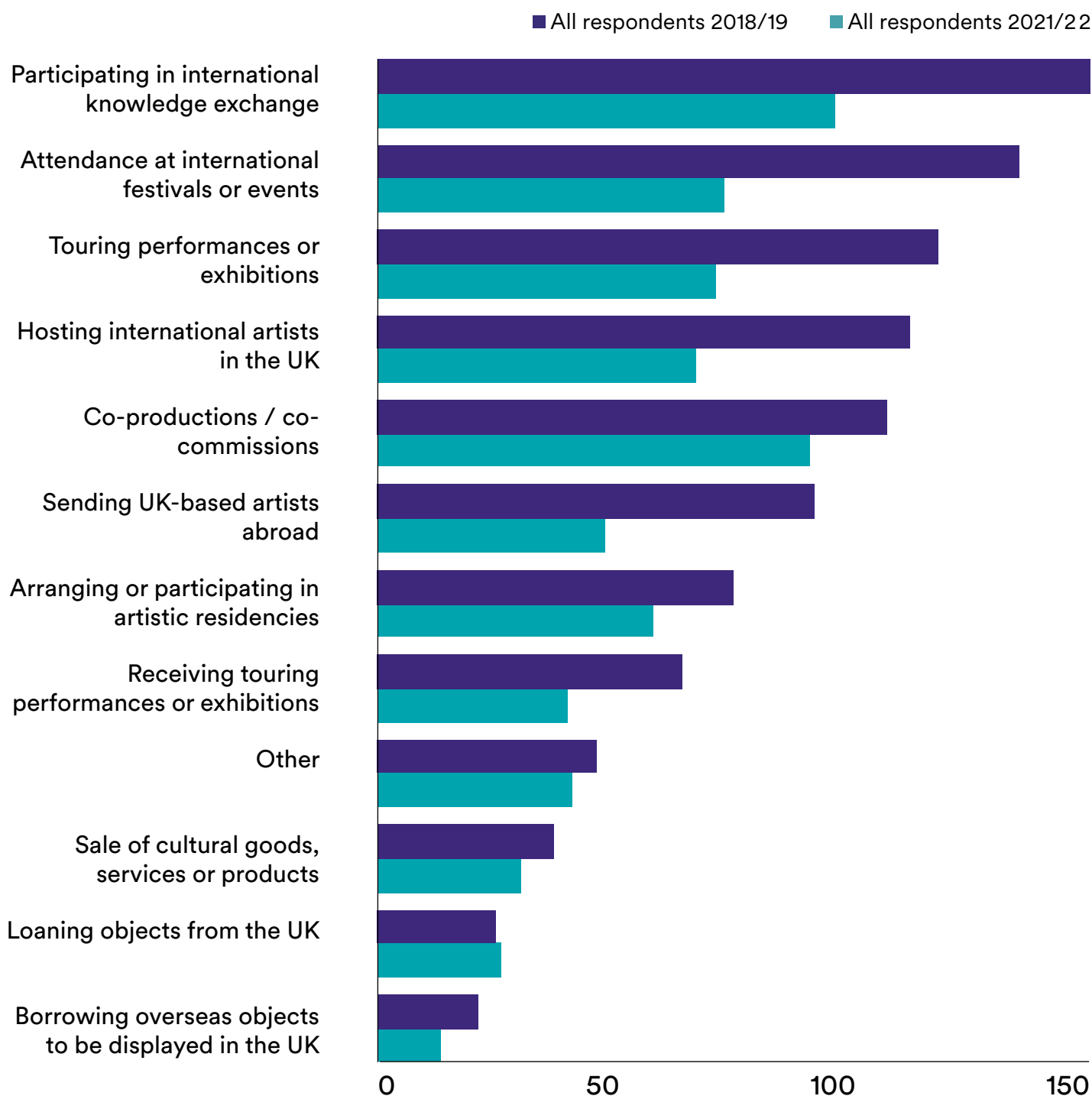
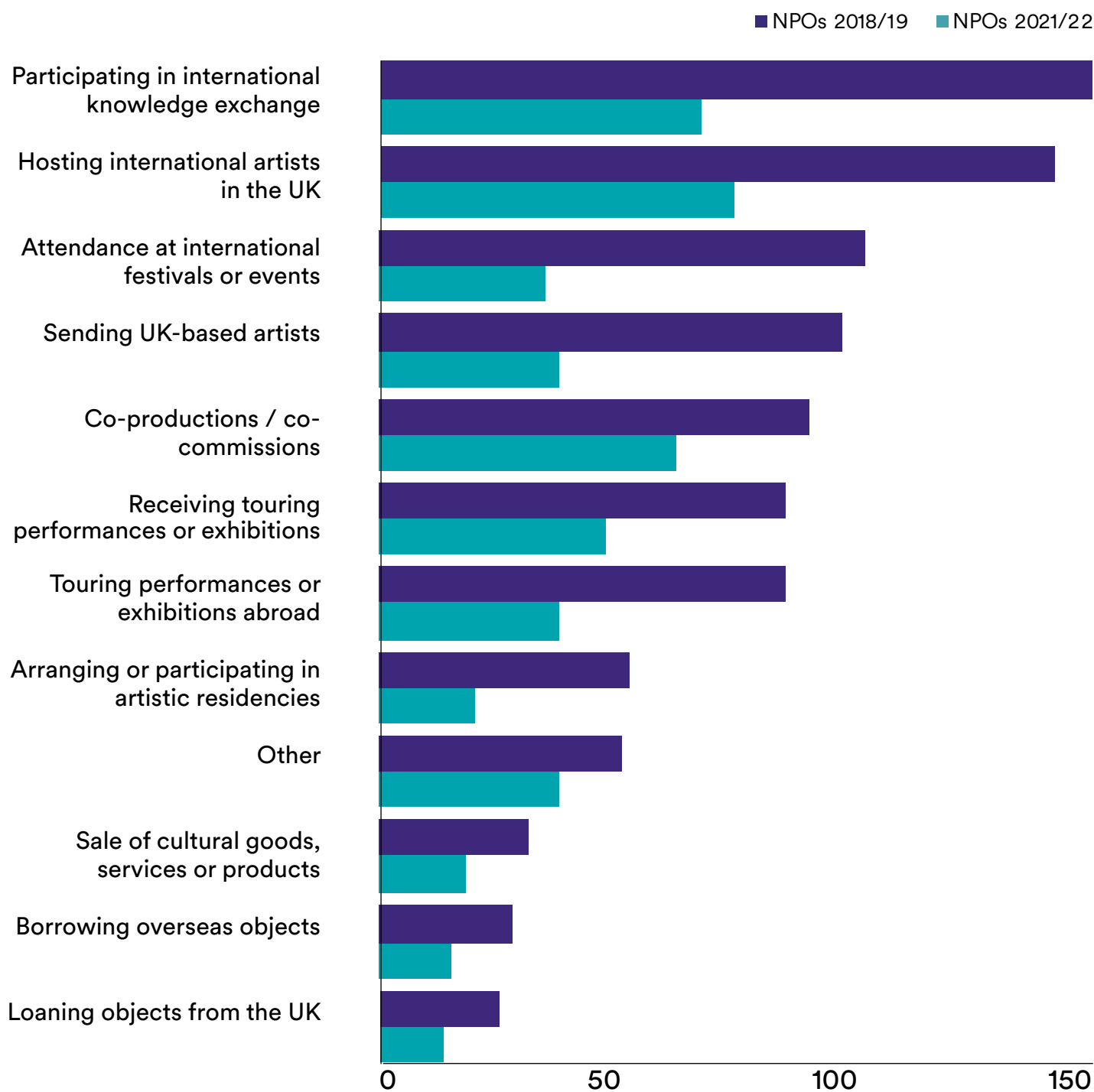


Figure 18

Frequency of activities involved in physical international arts projects, by NPO respondents, 2018/19-2021/22



Source: BOP Consulting 2022 Ref S2/ Table 3a

Figure 19

Frequency of activities involved in virtual international arts projects, by all respondents, 2018/19-2021/22

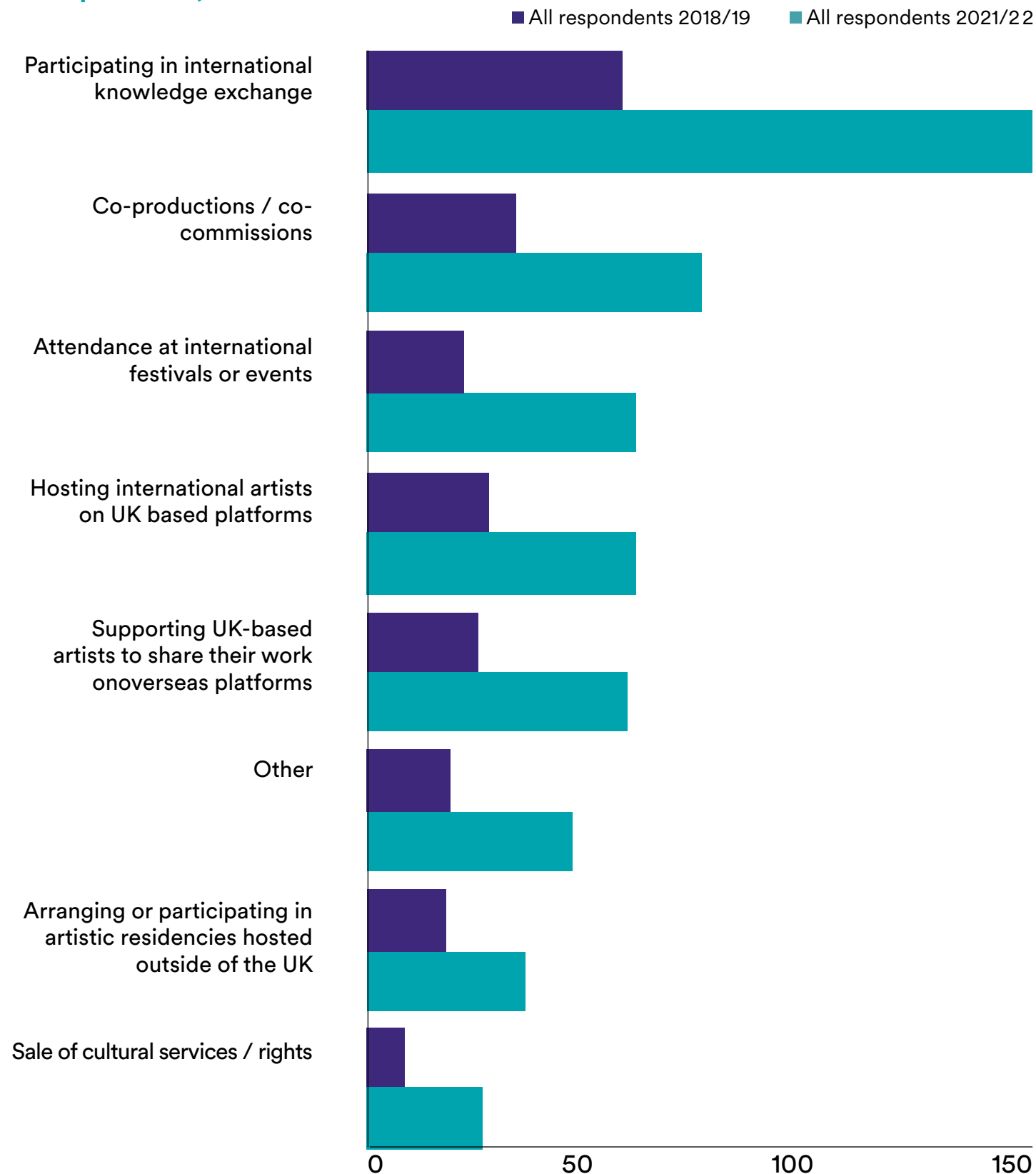
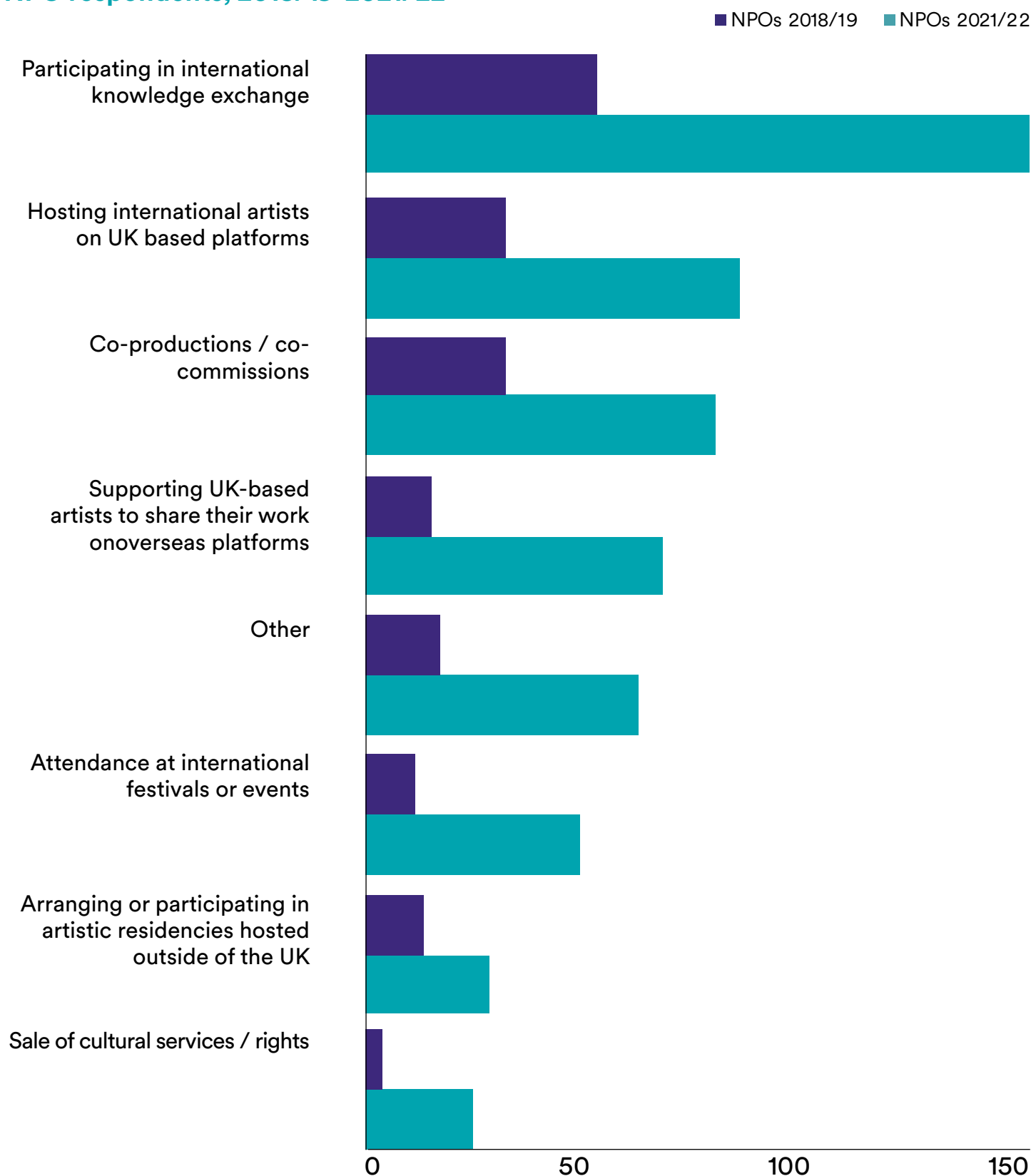


Figure 20

Frequency of activities involved in virtual international arts projects, by NPO respondents, 2018/19-2021/22



Source: BOP Consulting 2022 Ref S2/ Table 3b

Beyond White Mughals

British Ceramics Biennial

Following the success of HEART:BEAT, an artistic exchange between the UK and India supported by ACE's Reimagine India fund. The British Ceramics Biennial and Indian Ceramics Triennale continued their artists-led dialogue between 2018-21, exploring the relationship between ceramic traditions and contemporary clay practice.

In 2019, the exchange programme saw The British Ceramics Biennial welcome ceramic artist Shirley Bhatnagar from India for a six-week residency. During this time, Shirley produced an entire new collection, named Beyond White Mughals inspired by the relationship between British and Indian culture. The works were then presented back in India in an exhibition of and about ceramics by Charles Wallace India Trust in collaboration with the British Council.

The British Ceramics Biennial faced a hurdle when trying to transport Shirley's artwork back to India, as they were met with customs issues. Despite having prior experience dealing with customs procedures in various countries, they were unexpectedly charged a considerable customs fee. The British Ceramics Biennial are now considering options to avoid a similar situation in the future, such as seeking guidance before shipping any artwork or making arrangements for the artist to transport their works personally.

Despite the ongoing challenges with securing funding for international work, British Ceramics Biennial are looking forward to continuing the collaboration with the Indian Ceramic Triennial. They are also keen to explore more opportunities to internationalise their work with the support of ACE.

“We are absolutely delighted to continue working with the Indian Ceramics Triennial and will host Neha Pullarwar as an artist in residence for BCB 2023 with support from the Charles Wallace India Trust. We are also in discussion about a UK artist travelling to India to take part in ICT 2024.”



(c) Jenny Harper – Shirley Bhatnagar, Beyond White Mughals – British Ceramics Biennial 2019

EU School of Participation

Walk the Plank

EU School of Participation was a three-year (2019-2021) pan-European project which saw creative practitioners from Austria, Bulgaria, Lithuania, Serbia, and the UK come together for knowledge sharing, skills development, and network building in week-long residencies in each participating city.

The project as part of Coventry City of Culture programming, was funded by Creative Europe to develop and share outdoor arts practice within the cultural sector in the UK and on the continent. It provided a platform for artists and producers to explore what outdoor arts looks like in other regions, before feeding those insights into their own practices to further evolve outdoor arts.

Passing on knowledge is core to Walk the Plank's programming and they try to embed this in all of their projects. The EU School of Participation enabled them to do this internationally, and at great depth. Though they have previously worked internationally, they felt this project was one of the best opportunities for them to embody their core values of working with communities whilst increasing their international networks.

“It is essential for us to be working internationally, as it massively contributes towards our reputation – domestically and internationally.”

Since completing School of Participation, Walk the Plank feel they can no longer be involved in EU-funded projects in any capacity. They emphasise that had the UK not left the EU, they would still be working within these networks, looking to develop successful projects. Nevertheless, they intend to pursue international opportunities whenever feasible in the future.



The Nature of Why

Paraorchestra and Friends

The Nature of Why was an immersive project merging dance with live music. It featured a cinematic live score from Goldfrapp's Will Gregory and an ensemble of musicians from the British Paraorchestra. The project was commissioned by Unlimited, an organisation dedicated to celebrating the work of disabled artists, and produced by Paraorchestra and Friends, along with Bristol-based art producers MAYK.

The project was created in 2018, shortly after Paraorchestra and Friends became an NPO and began exploring new ways to artistically express their values. This newfound confidence allowed them to break down barriers and challenge expectations of what is possible for a disabled-led organisation. Through international collaborations, they were able to advocate for disabled artists on a larger scale, while also providing impactful opportunities for disabled musicians to showcase their talents.

“The investment from ACE accelerated the space for us to make art in many capacities. We now see international work as a key component of our business model.”

Their plans for international touring in New York and Perth, Australia were disrupted by the pandemic, and as a result, they have since found a lag in international markets revitalising their international programming. Although they continued to work digitally during the pandemic, the organisation recognise there is something intrinsic about in-person presentation; how it removes bias and shapes new ways of thinking for audiences - a legacy they intend to continue.

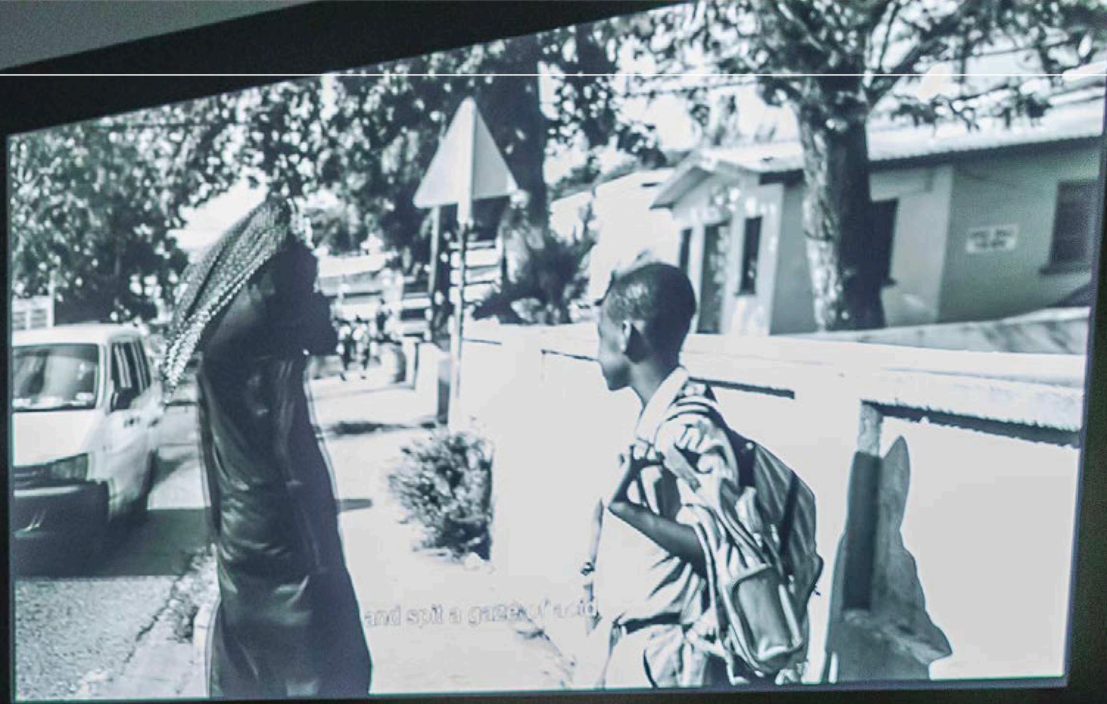
While they aspire to engage in international activity in 2023, they consider it unlikely whilst international markets continue to reset. Paraorchestra and Friends are entering a new period of growth this year, expanding their commissioning of ambitious large-scale work, and creating a new artist development programme for disabled musicians and music-makers.

However, they are actively seeking opportunities in 2024, with pencilled dates in the USA for The Nature of Why as well as a focus on delivering work as part of the Paris 2024 Cultural Olympiad



(c) Paul Blakemore – The Nature of Why, Bristol Old Vic – Paraorchestra 2018





4 Finances of international activity

This section outlines the income and expenditure that survey respondents reported as relating to their international activity, the sources of this income, and its significance to their operating models and mission.

Respondents reported their international revenues as total sum, rather than on a project-by-project basis. It also covers revenue from both virtual and physical projects.

4.1 NPO finances

4.1.1 NPO Revenues

The total revenue related to international activity generated by the NPO portfolio has fallen over time.

We estimate that across all NPOs, the portfolio generated £41.5m through international activity in 2018/19. This fell to an estimated £22.4m in 2021/22, broadly mirroring the estimated fall in the number of physical projects undertaken between the two data collection periods (see Figure 9).

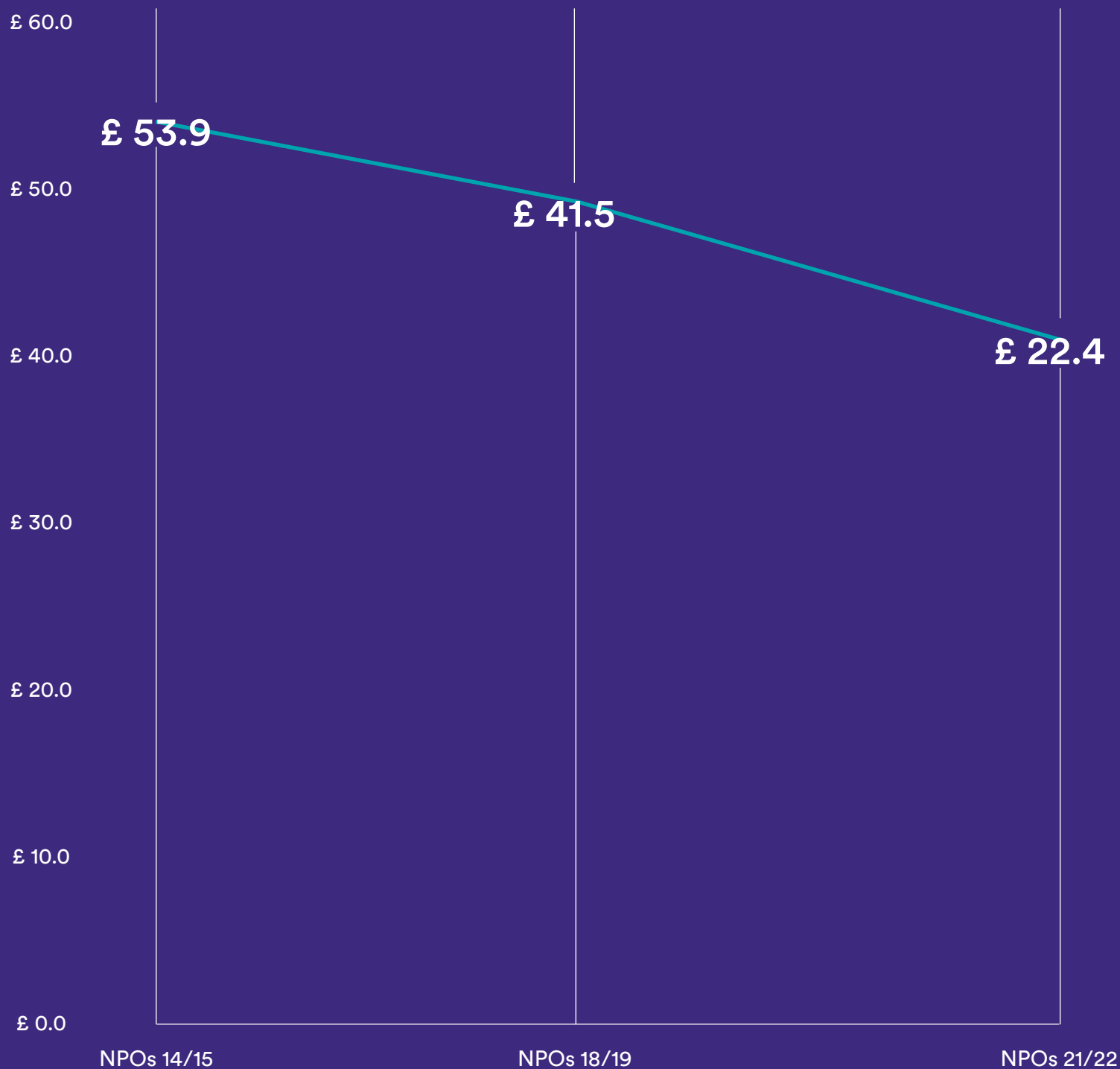
This drop in international revenue occurred despite the significant increase in virtual activity which kept the overall number of projects (physical and virtual) undertaken stable¹¹ (see Section 3.2.3). This suggests that the **virtual international activity undertaken did not have the same revenue generating potential as physical activity.**

It is also possible to observe a **‘pre-pandemic’ decline in revenue from international activity.** Estimated total international revenues generated across the NPO portfolio decreased by more than £10m between 2014/15 and 2018/19 (see Figure 22).

Similarly, the average international revenue generated by NPOs responding to the survey who carried out international work declined from £139,000 per NPO in 2014/15 (n=266) to £95,000 in 2018/19 (n= 106).

¹¹ 1,461 total (virtual and physical) projects were undertaken by NPOs 2018/19 and 1,463 total (virtual and physical) projects were undertaken by NPOs in 2021/22.

Figure 21
Estimated total revenue from international activity*
undertaken by all NPOs between 2014/15 and 2021/22,
millions (£000,000s)



Source: BOP Consulting 2022 Ref S3/ Table 1a. Survey results extrapolated to NPO population (2014/15 NPO population n=660, 2018 – 2022 NPO population n=807)

For a majority of NPOs who were active internationally, revenues from this activity comprised between 1 - 5 % of their annual turnover. However, for 14% internationally active NPOs in 2018/19 and 12% of the internationally active NPOs in 2021/22, international revenues made up at least one fifth of their turnover.

In contrast, there are a group of NPOs for whom international activity represents either none or a very marginal proportion of their turnover. For example, international activity represented less than 1% of annual turnover for 26% of internationally active NPOs in 2018/19. In 2021/22, international revenues represented less than 1% annual turnover for 20% of internationally active NPOs.

39% of internationally active NPOs said that this activity was either 'important' or 'very important' to their financial model in 2018/19 while 48% said the same for 2021/22.

NPO *Royal Philharmonic Orchestra* report that they generate 20% of their annual turnover from international work, which provides income for reinvestment to improve the breadth and quality of activity produced by the orchestra. Similarly, international activity accounts for roughly 20-30% of NPO *Ad Infinitum Productions'* total revenues.

At the same time, NPO *Disability Arts Online* reported that international activity accounted for under 10% of their annual turnover. They are looking to make sustainable increases in this area as part of their future business model, with forecasts for the end of the next year in the region of 13-15% of their turnover.

Figure 22

Revenue associated with international activity as a % of annual turnover (internationally active NPOs), 2014/15 – 2021/22

International revenues as % annual turnover	NPOs 2014/15	NPOs 2018/19	NPOs 2021/22
< 1%	14%	26%	20%
1-5%	39%	33%	41%
6 - 20%	29%	27%	27%
21 - 50%	11%	11%	10%
51 - 89%	3%	2%	1%
90% +	3%	1%	1%

Source: BOP Consulting 2022 Ref S2/ Table 3b

4.1.2 Profitability

International activity generated a modest net financial benefit to the NPOs who took part

For those NPOs who were able to report both their income and expenditure associated with international work, this activity contributed an **average net income of £3,071 in 2018/19, rising to £8,141 in 2021/22¹²**.

Despite an average net profit, international activity was **cost neutral for 58% NPOs in 2018/19** – meaning their associated costs were equal to the income generated. In the same period, **15% NPOs made a net loss** from international activity and **27% NPOs made a net profit**.

¹² BOP Consulting 2022 Ref S3/ Table 3b. NPOs 2018/19, n =102, NPOs 2021/22, n = 67

In **2021/22**, **51% NPOs reported a net profit** from their international engagements and **28% reported a net loss**. For **21% NPOs**, this activity was **cost neutral**¹³.

This represents an increase in the net balance of NPOs generating profit from international activity, from 12% in 2018/19 to 23% in 2021/22. This is despite an overall decrease in international activity, both in terms of the proportion of organisations that do it, but also in terms of the number of projects and the size of them (as measured by revenues).

One organisation told us that they would only consider international activity if it was guaranteed to break even. We also heard from other organisations that they faced increased challenges – financial and otherwise – in undertaking international activity post-pandemic. Therefore, we might hypothesise that the higher balance of NPOs reporting profit in 2021/22 than in 2018/19 is at least partially a result of a greater level of perceived risk associated with international activity after the onset of the pandemic – and greater risk aversion in the way opportunities are both taken up and delivered.

“Some of our international projects pay well, but we use these funds to cover staffing costs. Generally, we do not view our international work as profit-making; at most, we break even.”

Lindsey Hall, Real Ideas

While financial viability was an important consideration reported by NPOs in the qualitative interviews, organisations generally expected either very modest profits or to break even from international activity, prioritising exposure, audience development and general appreciation of practice

¹³ BOP Consulting 2022 Ref S3/ Table 3c. NPOs 2018/19, n =102, NPOs 2021/22, n = 67

¹⁴ Not all NPOs were able to provide breakdown of their international income by source. NPOs 2018/19 n = 110, NPOs 2021/22 n = 55

¹⁵ *Ibid*

over generation of profit. More data on the motivations for undertaking international activity can be found in Section 6.

4.1.3 NPO income sources

Earned income (i.e. income derived from ticket sales, workshop fees or selling work or publications etc) was the most significant component of international revenues for NPOs in both 2018/19 and 2021/22, although earned income as a proportion of total international income fell from 65% to 49% over this period.¹⁴

Although the proportion of revenue reportedly derived from the European Union has increased between 2018/19 and 2021/22¹⁵, revenues from the EU declined in absolute terms. Therefore this is arising from by a decline in the overall value of NPO international revenues, driven principally by the fall-off in earned income, rather than an increase in EU funding in England.

Furthermore, future access to public funding to support international activity from EU sources such as Creative Europe, is becoming an increasing concern for NPOs. According to one interviewee ‘the competition [for funding] is increasing, and I think in the next five years, we’ve got really challenging times ahead’.

Beyond earned income, other funding sources cited by NPOs include cultural institutions, trusts and foundations, charities, and grassroots support.

Other reported funding sources supporting international activity undertaken by NPOs between 2018/19 and 2021/22:

British Council	The Moondance Foundation	Unlimited
Goethe-Institut	The Oak Foundation	ArtRwanda -Ubuhanzi
Africa Culture Fund	Kuopio Dance Festival	Dutch National Ballet
Creative Europe	Wales International Art	Venue partner commissions

Figure 23a
Breakdown of reported
international revenue of NPOs
by income source, 2018/19

65 %
Earned income

15 %
Other public funding
(excluding Arts Council and EU)

11 %
ACE project grant
(excluding capital funding)

5 %
Contributed income (grants, donations, sponsorship)

4 %
EU Funding

Figure 23b
Breakdown of reported
international revenue of NPOs
by income source, 2021/22

49 %
Earned income

12 %
Other public funding
(excluding Arts Council and EU)

21 %
ACE project grant
(excluding capital funding)

10 %
Contributed income (grants, donations, sponsorship)

8 %
EU Funding

4.2 Grant recipient finances

4.2.1 Grant recipient revenues

Survey respondents who were not funded through the national portfolio but through other Arts Council England grants ('grant recipients') reported a combined total of **£3.5million** generated through international activity in 2018/19 and a combined total of **£3.1million** in 2021/22¹⁶.

The average revenue associated with international work among internationally active grant recipients was **£20,500 in 2018/19** and **£20,000 in 2021/22**¹⁷. This is significantly less than the average international revenue of NPOs, likely reflecting the high proportion of individual practitioners within this cohort.

4.2.2 Grant recipient revenues

In 2018/19, the average net profit reported among grant recipients was **£1,551**. However, in **2021/22**, this activity represented an average net loss of **-£145**. This suggests that international activity may represent a higher financial risk for this (majority freelancer) group than for NPOs, for whom international activity was more profitable on average.

Breaking this down further, we find that 38% grant recipients made a net profit from international activity in 2018/19, with 29% incurring a net loss and 33% reporting cost neutral activity.

In 2021/22, the proportion of grant recipients reporting a net loss rose to 37%, with the same proportion (37%) reporting a net profit. 26% grant recipients reported that their activity in this year was cost neutral.

Source: BOP Consulting 2022 Ref S3/ Table 1a. NPOs 2018/19 n = 110, NPOs 2021/22 n = 55

¹⁶ BOP Consulting 2022 Ref S3/ Table 1a. 2018/19, n =174, 2021/22, n = 162

¹⁷ BOP Consulting 2022 Ref S3/ Table 1d. 2018/19, n =174, 2021/22, n = 162

4.3 Variance

4.3.1 Variance by size

Larger NPOs generated more income from international activity.

There is a clearly observable relationship between the annual turnover of NPOs and the average value of revenues related to international activity. This is particularly evident when comparing the average international revenues of the smallest turnover band - which were less than £10,000 in both 2018/19 and 2021/22 – and the average international revenues of the NPOs with the largest turnovers, which topped £100,000 in 2018/19 falling to just over £85,000 in 2021/22.

Figure 24

Average value of international revenues generated by NPOs, broken down by annual turnover, 2014/15 – 2021/22

Turnover band	NPOs 14/15	NPOs 18/19	NPOs 21/22
£0 - <£300k	£12,389	£9,591	£7,294
£300k-<£600k	£26,159	£24,487	£19,461
£600k-<£1m	£98,315	£22,708	£24,655
£1m-£2m	£132,301	£93,226	£68,933
£2m+	£236,545	£115,740	£85,087

Source: BOP Consulting 2022 Ref S3/ Table 1c. (2014/15 NPOs n = 426, 2018/19 NPOs n = 307. 2021/22 NPOs n = 312)

Also of note is the decline in the average international revenues of the NPOs with annual turnovers of more than £2million, which more than halved between 2014/15 and 2018/19, mirroring the similar decline in number of projects undertaken by this group between these periods outlined in Section 3.3.1.

4.3.2 Variance by artform

Across all three data collection periods, music and dance NPOs generated the highest value international revenues on average by a significant margin. Case studies for the Birmingham Royal Ballet and the Royal Philharmonic Orchestra highlight the international appeal of English art and music institutions.

Figure 25

Average value of international revenues generated by NPOs, broken down by artform, 2014/15 – 2021/22

Artform	NPOs 14/15	NPOs 18/19	NPOs 21/22
Music	£142,329	£127,390	£75,063
Dance	£137,536	£85,434	£68,719
Theatre	£77,976	£52,018	£18,414
Visual arts	£70,891	£27,320	£31,313
Combined arts	£45,127	£23,237	£22,223
Literature	£55,088	£16,785	£18,076
Museums	NA	£11,618	£30,000
Not discipline specific	£7,034	£11,157	£44,007
Libraries	NA	£0	£0

Source: BOP Consulting 2022 Ref S3/ Table 1c. 2014/15, n = 426, 2018/19, n = 307, 2021/22, n = 312

Ignite

Birmingham Royal Ballet

Commissioned in partnership with the Dutch National Ballet, Ignite which premiered in autumn of 2018 drew inspiration from the painting ‘The Burning of the Houses of Lords’ by British artist William Turner. The choreography was created by Juanjo Arqués, with music produced by Kate Whitley, dramaturgy led by Fabienne Vegt, and set and costumes designed by Tatyana van Walsum.

Ignite was a part of Ballet Now, a commissioning program that began in 2017 with a budget of £1.1 million over five years. The program aimed to support diverse and international talent in the fields of choreography, composition, and design.

The performance, which toured across the UK, Germany, and the Netherlands, brought confidence to the Birmingham Royal Ballet in their ability to commission contemporary works, something they are keen to continue in the future.

“ACE funding is a crucial contribution that supports us in producing a product that contributes to how Britain represents itself on a global scale.”

Though the Birmingham Royal Ballet only spend approximately 1% of their yearly turnover on international activity, it continues to be an important aspect of their vision and reputation. Off the back of Ignite, they are developing a production with Kate Whitley which will be premiered in Rotterdam (2024). It is then likely to tour to Luxembourg, Madrid, Bonn, and Palanga in Lithuania. They also have a strong international pipeline over the next five years, which includes touring to New York (2023), Rotterdam (2024), Washington DC (2025) and Japan (2025).



(c) Johan Persson – Tom Rogers & Yu Kurihara in Will Tuckett's *Lazuli Sky*,
Birmingham Repertory Theatre – Birmingham Royal Ballet 2020





5 Geography of International activity

5.1 Geographic breakdown of activity

The European Union remains the most significant region for international activity of English arts and cultural organisations and practitioners post-Brexit.

International collaborations involving the European Union (EU) represented more than four times the number of international collaborations involving the next most frequently cited global region (North America)¹⁸.

The percentage of respondents reporting that they worked with EU member states increased, albeit marginally, between 2014/15 and 2018/19, despite the vote to leave the EU in 2016 (see Figure 27). Even after the end of the transition period, the level of activity with the EU has remained stable. This demonstrates the continued significance of England's cultural ties to its closest neighbour.

This is also supported by evidence from the qualitative research. Organisations noted that despite the difficulties post-Brexit, the European market remains attractive due to its proximity to the UK, cultural diversity, and high standard of professional practice. However, they also noted these challenges, including both the loss of freedom of movement and, crucially, a drop in funding opportunities through Creative Europe, may yet see a decline in collaborations with European partners.

“The Eastern European tour was an important moment for UK and European relations [during a period of political uncertainty, in Autumn/Winter of 2022]. It was enormously successful, both socially and politically.”

James Williams, Royal Philharmonic Orchestra

¹⁸ Respondents were asked which countries their international activity took place with. They did not report the number of projects per country. As such, this section analyses international collaborations rather than volume of projects by geographic region.

Other observable trends in physical activity include the continued importance of the North American market, the second most frequently reported region for international partnerships.

While it still makes up a small proportion of total collaborations, there appears to have been a steady increase in the proportion of in-person international collaborations involving African countries. This is supported by the qualitative research, where organisations expressed an interest in exploring future opportunities in Africa. However, organisations also acknowledged that their decisions about where in the world they work are often steered by the priorities of government, funders and project partners.

Figure 26a

Global regions involved in physical and virtual international activity as a % of all international collaborations (all respondents), 2014/15 – 2018/19

Global Region	Physical 2014/15	Physical 2018/19	Virtual 2018/19	Physical 2021/22	Virtual 2021/22
Africa	1%	3%	7%	4%	10%
Arab States	1%	2%	2%	1%	5%
Asia	14%	10%	15%	11%	21%
Australia	5%	4%	2%	3%	7%
EU	54%	59%	39%	57%	27%
Europe (non-EU)	6%	6%	4%	7%	5%
Latin America & the Caribbean	6%	3%	13%	4%	11%
North America	13%	12%	17%	12%	14%

Source: BOP Consulting 2022 Ref S4/ Table 1b. Data refers to number of collaborations rather than volume of projects in each region.

Virtual activity involved a more diverse range of countries than physical activity.

The distribution of virtual activity across global regions differed from physical activity. While EU countries remain the most frequently reported partners for virtual activity in both 2018/19 and 2021/22, the gap between this region and the second most frequently reported region diminishes in comparison with physical projects.

In 2021/22, when the bulk of virtual activity was reported to have taken place, **Asia, rather than North America, was the second most frequently reported region**, representing 21% of all virtual activity. A further 10% of virtual collaborations over this year involved countries in Africa (excluding Arab states), compared with 4% of physical activity. Latin America and the Caribbean and the Arab States also saw an increase in the share of virtual activity when compared with physical projects.

The survey findings suggest indicates that virtual, digital activity has offered organisations and practitioners the opportunity to work with a wider range of countries than physical activity.

“Online activity has become more common, and we’ve taken on a more hybrid model to exchange our practice digitally. During the pandemic, we strategically embraced the digital side as an opportunity to increase our global visibility.”

Andrew Loretto, Play to the Crowd

This is also supported by interview data, in which organisations noted that whilst virtual activity did not always provide audiences with the same impact as physical activity, it enables them to extend their reach and increase the exposure of their organisation.

London-based organisation *Shobana Jeyasingh Dance* were approached by Kuopio Dance Festival, a Finnish organisation inviting them to showcase their production *TooMortal* at the 2021 festival.

This came about as a result of their online programming in 2020 that included the site-specific piece, which was originally commissioned in 2012 by La Biennale di Venezia (Venice). As the performance gained traction, it was subsequently seen by a Kuopio Dance Festival programmer.

For *Shobana Jeyasingh Dance*, the 2021 performance was an opportunity for the company to revitalise its physical activity and a chance for its dancers to perform again, which would not have been possible without their earlier virtual activity.

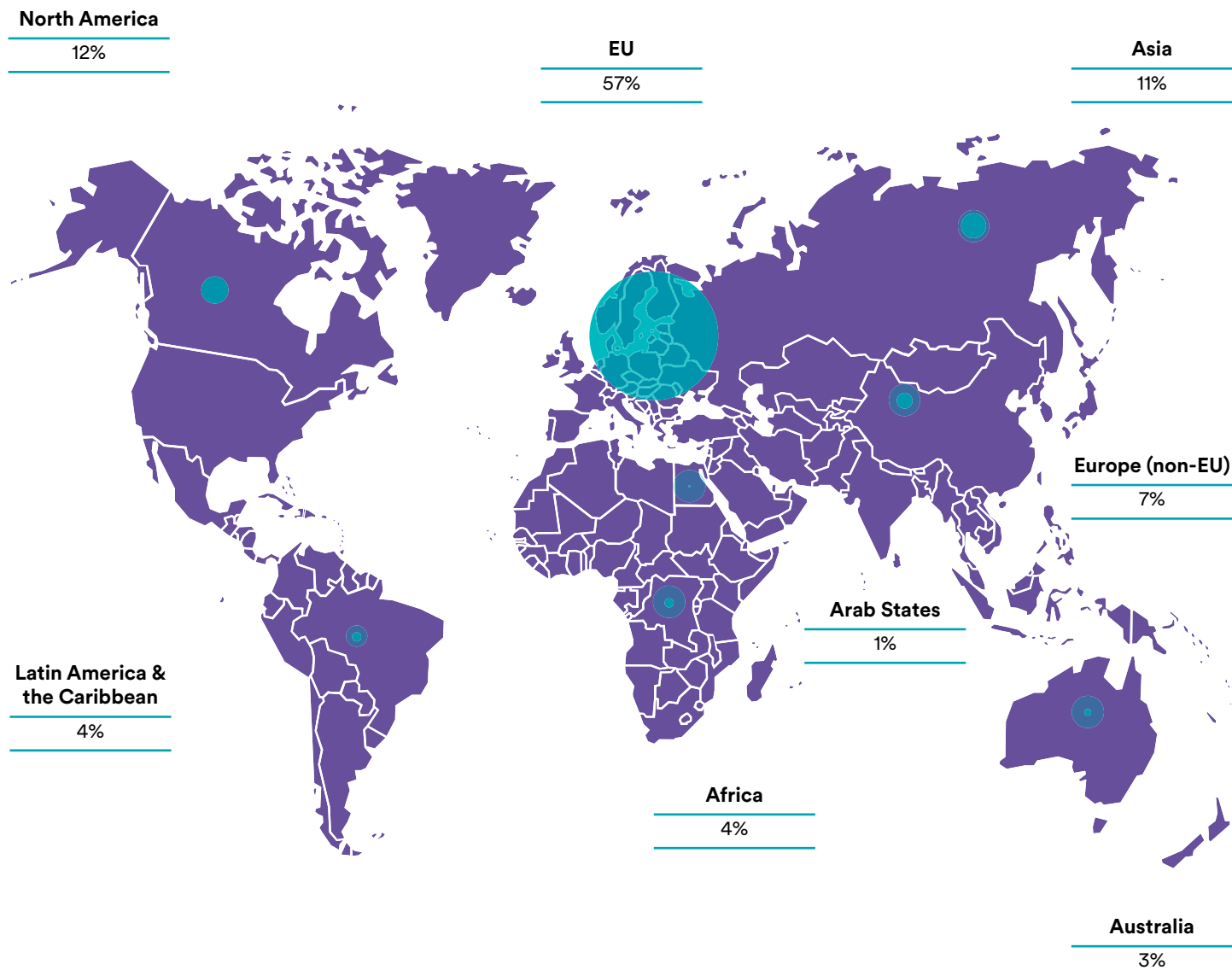
Looking into geographic data on a more granular level, little change can be observed in the top ten countries for physical activity between 2014/15 and 2021/22, which are almost exclusively European or Anglophone nations (with the exception of China, which was the tenth most reported country in 2018/19, but dropped to 17th in 2021/22) (see Figure 28).

The dominance of European and Anglophone countries is not repeated within the top ten countries for virtual activity, with three of the leading emerging economies - India, Brazil and South Africa - making the list in both 2018/19 and 2021/22.

Across both data collection periods, almost all (98% in 2018/19 and 96% in 2021/22) virtual collaborations took place with countries that the respondent organisation or practitioner **did not also work with in terms of the physical movement of people, work, collections, or products**¹⁹. In other words, most of these relationships were entirely virtual.

Figure 26b

Global regions involved in physical international activity as a % of all international collaborations (all respondents), 2021/22



Source: BOP Consulting 2022 Ref S4/ Table 1b. Data refers to number of collaborations rather than volume of projects in each region.

Figure 26c

Global regions involved in virtual international activity as a % of all international collaborations (all respondents), 2021/22

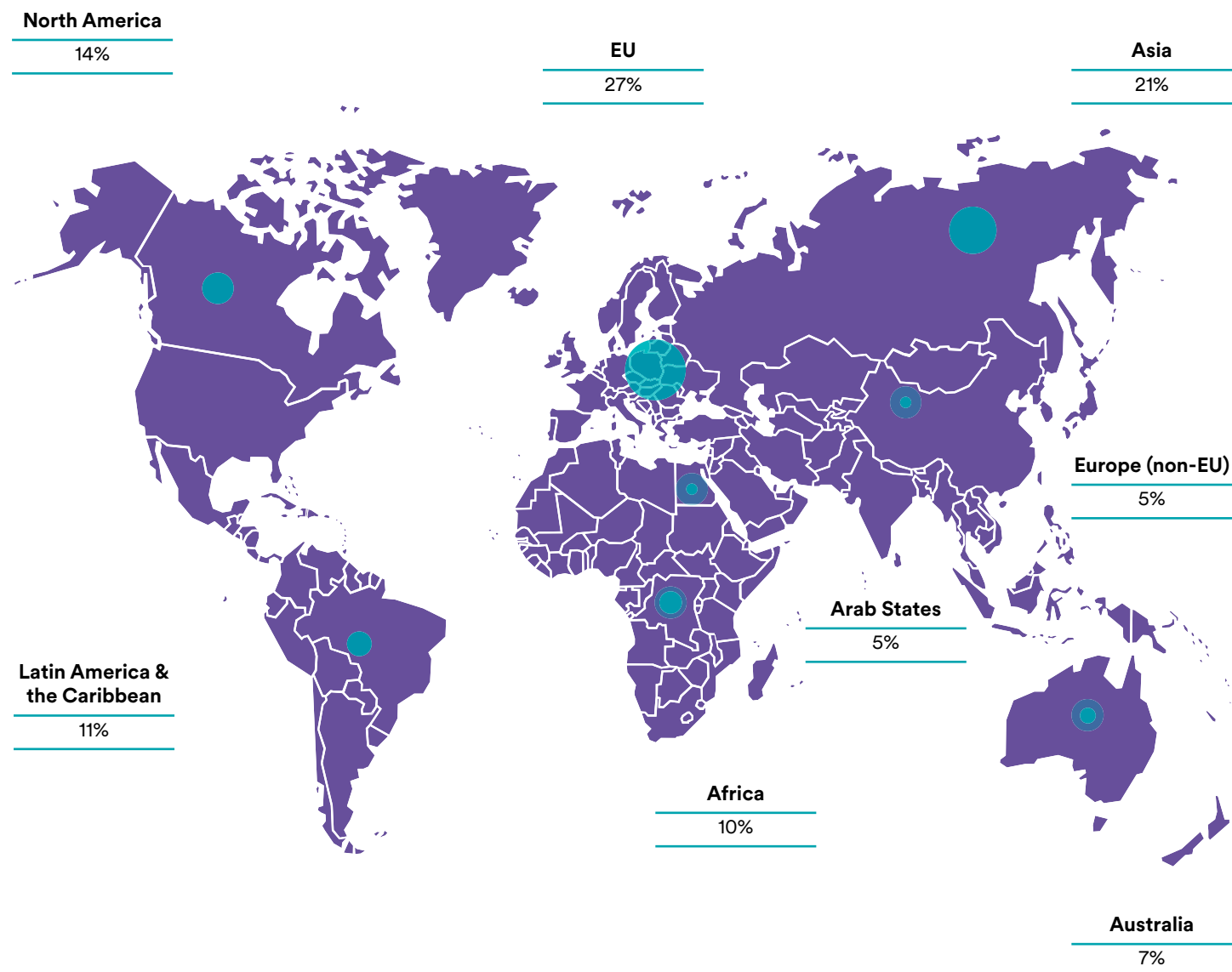


Figure 27**Top 10 countries and territories which were involved in physical and virtual international activity, 2014/15 – 2021/22**

	NPOs 2014/15	Physical 2018/19	Virtual 2018/19	Physical 2021/22	Virtual 2021/22
1	USA	Germany	USA	USA	USA
2	France	USA	India	Germany	= Australia = India
3	Germany	France	= Spain	France	
4	Spain	Netherlands	= Romania = Brazil	Italy	Germany
5	Netherlands	Italy		Spain	= South Africa = Brazil
6	Italy	Spain	= Germany	Belgium	
7	Australia	Belgium	= China = Portugal	Netherlands	Canada
8	Belgium	Australia	= South Africa	Canada	= Netherlands
9	Canada	Canada	= Singapore = Pakistan	Sweden	= Italy = Sweden
10	Sweden	China		Australia	

Source: BOP Consulting 2022 Ref S4/ Table 1a

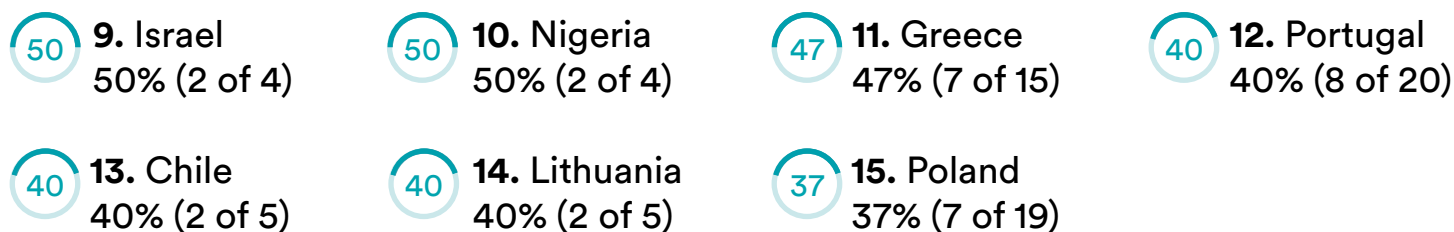
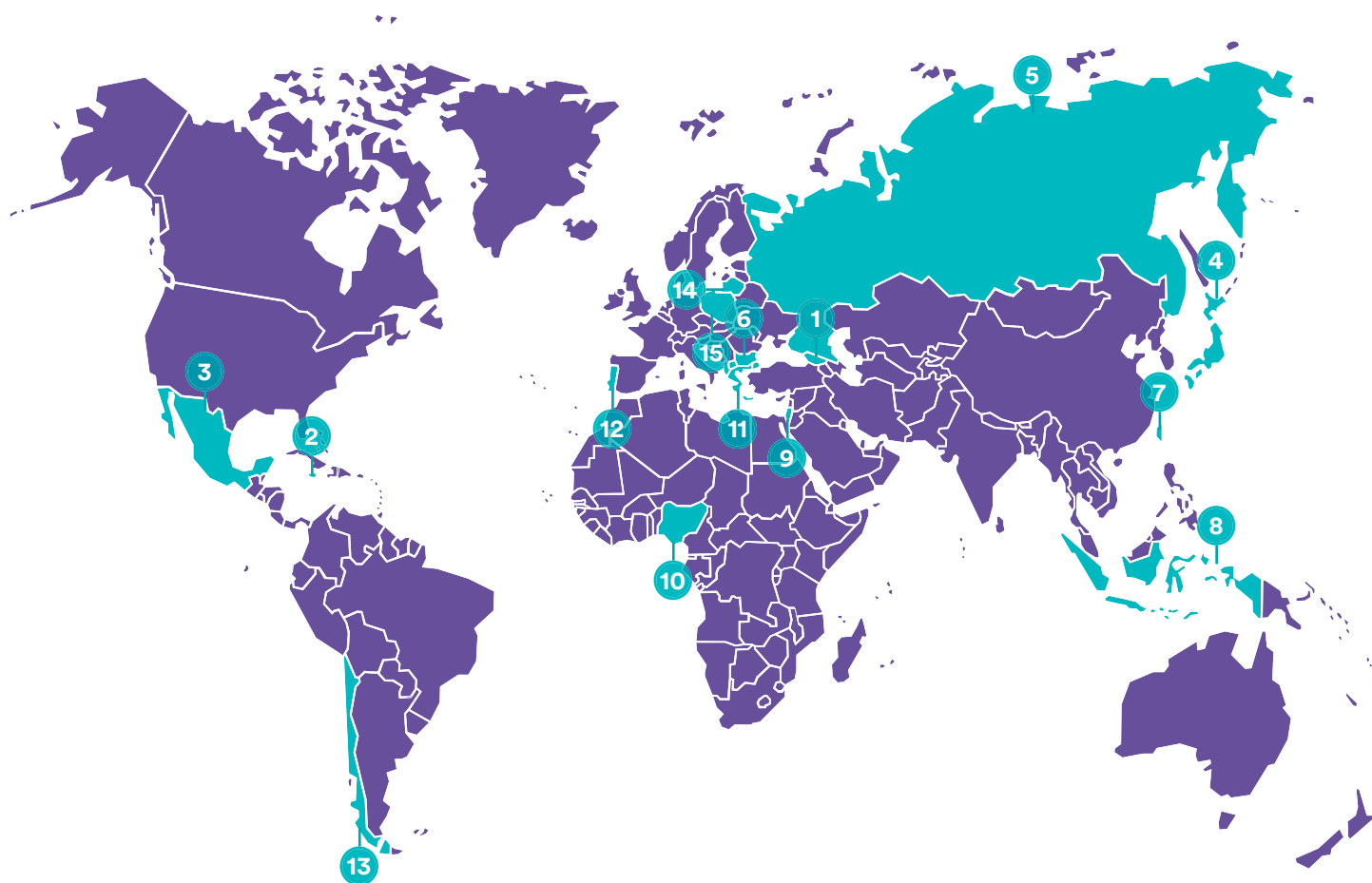
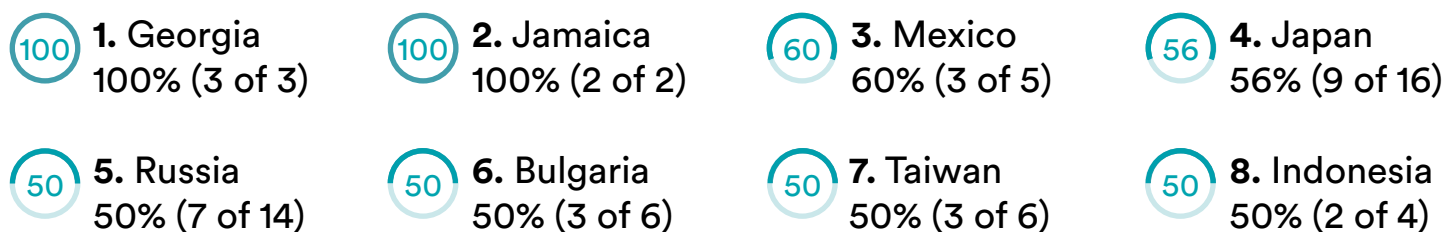
5.1.1 Emerging countries and territories

The table overleaf (Figure 29) outlines the countries and territories in which the highest proportion of respondents said they were engaging in-person with this particular geography for the first time, to identify ‘emerging’ markets for international activity. In an effort to uncover trends, countries in which only one collaboration²⁰ took place have been excluded from this analysis.

²⁰ Excluded countries in which 100% (1 of 1) of collaborations were new: Azerbaijan, Colombia, Kazakhstan, Malaysia, Mauritius in 2018/19 and Malaysia, Slovakia, Zimbabwe, Bahrain, Belize, Benin, Botswana, Burkina Faso, Cape Verde, Kosovo, Trinidad and Tobago, Bangladesh, Panama, Uganda in 2021/22

Figure 28a

Top emerging countries and territories for physical activity (% respondents engaging with the country or territory for the first time)*, 2018/19

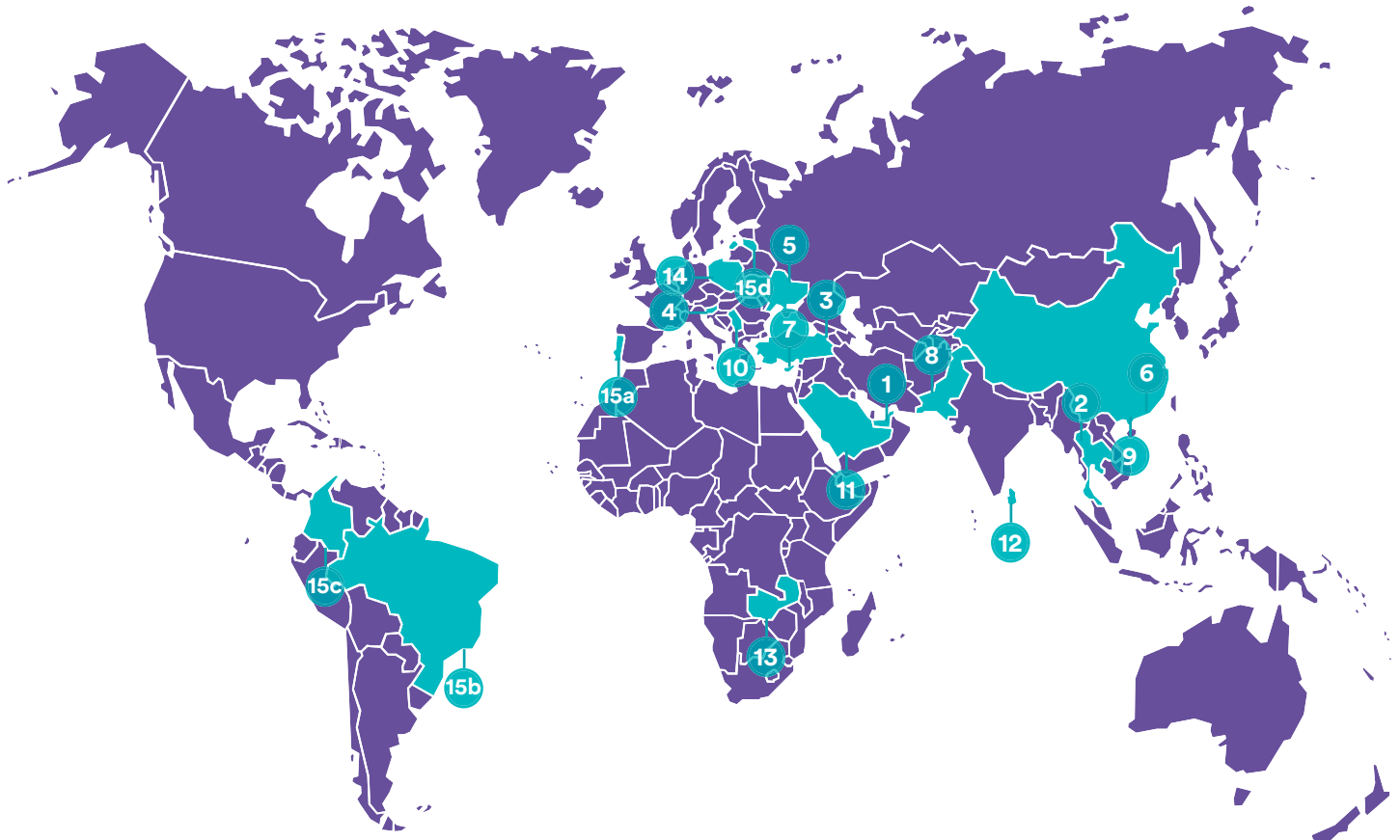


Source: BOP Consulting 2022 Ref S4/ Table 2a. * Countries with only one reported collaborator have been excluded from this analysis.

Figure 28b

Top emerging countries and territories for physical activity (% respondents engaging with the country or territory for the first time)*, 2021/22

- | | | | |
|---|---|-------------------------------------|---------------------------------------|
| 100 1. United Arab Emirates
100% (2 of 2) | 100 2. Thailand
100% (2 of 2) | 80 3. Turkey
80% (2 of 5) | 75 4. Slovenia
75% (3 of 4) |
| 67 5. Ukraine
67% (2 of 3) | 67 6. Honk Kong
67% (2 of 3) | 67 7. Cyprus
67% (2 of 3) | 67 8. Pakistan
67% (2 of 3) |



- | | | | |
|--------------------------------------|---------------------------------------|--|---|
| 50 9. China
50% (6 of 12) | 50 10. Serbia
50% (3 of 6) | 50 11. Saudi Arabia
50% (1 of 2) | 50 12. Sri Lanka
50% (1 of 2) |
| 50 13. Zambia
50% (1 of 2) | 42 14. Poland
42% (5 of 12) | 40 15a. Portugal
40% (6 of 15) | 40 15b. Brazil
40% (4 of 10) |
| | | | 40 15c. Colombia
40% (2 of 5) |
| | | | 40 15d. Latvia
40% (2 of 5) |

Source: BOP Consulting 2022 Ref S4/ Table 2a. * Countries with only one reported collaborator have been excluded from this analysis.

In interviews, one interviewee reported that the geography of their international activity was highly influenced by the opportunities presented by British Council funding. They highlighted the significance of the British Council as a facilitator in supporting international activity, through their extensive network and on the ground support. In 2019, the British Council hosted major cultural seasons with Georgia, Japan and Russia²¹, all of which appear in the top emerging territories list for 2018/19. Likewise, 2022 saw the British Council Pakistan/UK season. The country also appears within the emerging countries list for 2021/22.

This suggests that British Council priority countries and territories – and the accompanying resource and activities– may have influenced the collaborations reported.

The Royal Philharmonic Orchestra

Eastern European Tour

Royal Philharmonic Orchestra

The Royal Philharmonic Orchestra Eastern European Tour was a seven day, seven concert tour across Slovakia, Croatia, Poland, Lithuania, and Greece.

“We were able to showcase our work in more distinct territories across Europe [...] it remains the most accessible region for us to tour.”

The Royal Philharmonic Orchestra represented Britain as they became the first international orchestra to perform in Kaunas (Lithuania), a performance which formed part of their European Capital of Culture 2022 programme and was attended by the country’s President. Equally, they were the first international orchestra to perform at the Thessaloniki Concert Hall for several years, reigniting the Hall’s international music season.

While these were new venues and territories for the Orchestra, they reported that Europe remains the global region they can most easily access.

The tour cemented the Royal Philharmonic Orchestra’s commitment to continue international work, and they are now hoping to use the same model to engage with new and non-traditional territories, using culture as a catalyst to enhance the profiles of those cities and support them in realising their cultural ambitions.



Drum up a Circus

NoFit State

Drum up a Circus was a three-country co-production between NoFit State - a contemporary circus company based in the UK; Circus Zambia – a social circus company based in Zambia, and Ingoma Nshya - a women’s drumming group based in Rwanda.

The project came about when the three organisations met and decided to showcase their different cultural backgrounds, strengths, and practices in one production. The ACE NPO alongside Circus Zambia, and Ingoma Nshya were funded by multiple organisations, domestic and international including: The British Council, The Moondance Foundation, Wales Arts International, 11.11.11, Art Ubuhanzi Rwanda, Africa Culture Fund and The Woman Cultural Centre in Rwanda to deliver this project.

Drum up a Circus took place within the first year of the pandemic and when Black Lives Matter was at its height. Although the project was not a response to the movement, NoFit State found that black-led companies and artists began to trust them in a way they had not before. They have since seen an increase in the number of diverse artists applying and engaging with the organisation.

“The project enabled us to break the perception with local people in Wales and more broadly across the UK in relation to racial diversity within the Circus industry.”

NoFit State have always had an international focus as part of their business model, where their work includes touring, networking, running festivals internationally, and peer to peer learning. Whilst they made the decision in 2019 to no longer send an entire production to one festival due to its environmental impacts, they are excited to continue to *Bring the World to Wales and take Wales to the World*.



5.2 Revenues by geographic region

Nearly three quarters of reported international revenues were generated through collaborations with countries from the European Union and North America.

For those survey respondents who were able to provide details on the geographic region associated with their international income, **partnerships with EU and North American countries accounted for between 73 and 74 percent of these revenues** (see Figure 30)

While it is tempting to draw conclusions about the relative lucrativeness of each geographic region by comparing breakdown of revenues by region with the breakdown of collaborations by region, we cannot be definitive about this relationship with the available data. Figure 26 shows the frequency with which survey respondents reported undertaking (at least one) collaboration with the region in question but does not account for the number of projects that took place. Without knowing the volume of activity as well as the volume of partnerships, we can't be certain about which markets are most lucrative.

However, in interviews organisations reported that their European activity over the data collection periods was largely supported financially by Creative Europe funding. The loss of UK organisations' eligibility status post-Brexit will therefore impact the financial viability of this work, which may in turn impact future revenue derived from the European Union.

At the same time, organisations reported that gaining funding within North America was increasingly difficult due to their complex funding processes, which discouraged organisations from seeking partnerships within the region. Organisations reported that they are looking at the possibilities of working in other regions which may be more financially viable, such as Asia.

Arts organisations and practitioners are therefore facing with fewer opportunities in future to pursue international projects in the two regions that currently constitute the majority of projects and the large majority of revenues.

Figure 29a
Reported international revenue
by associated geographic region,
2018/19

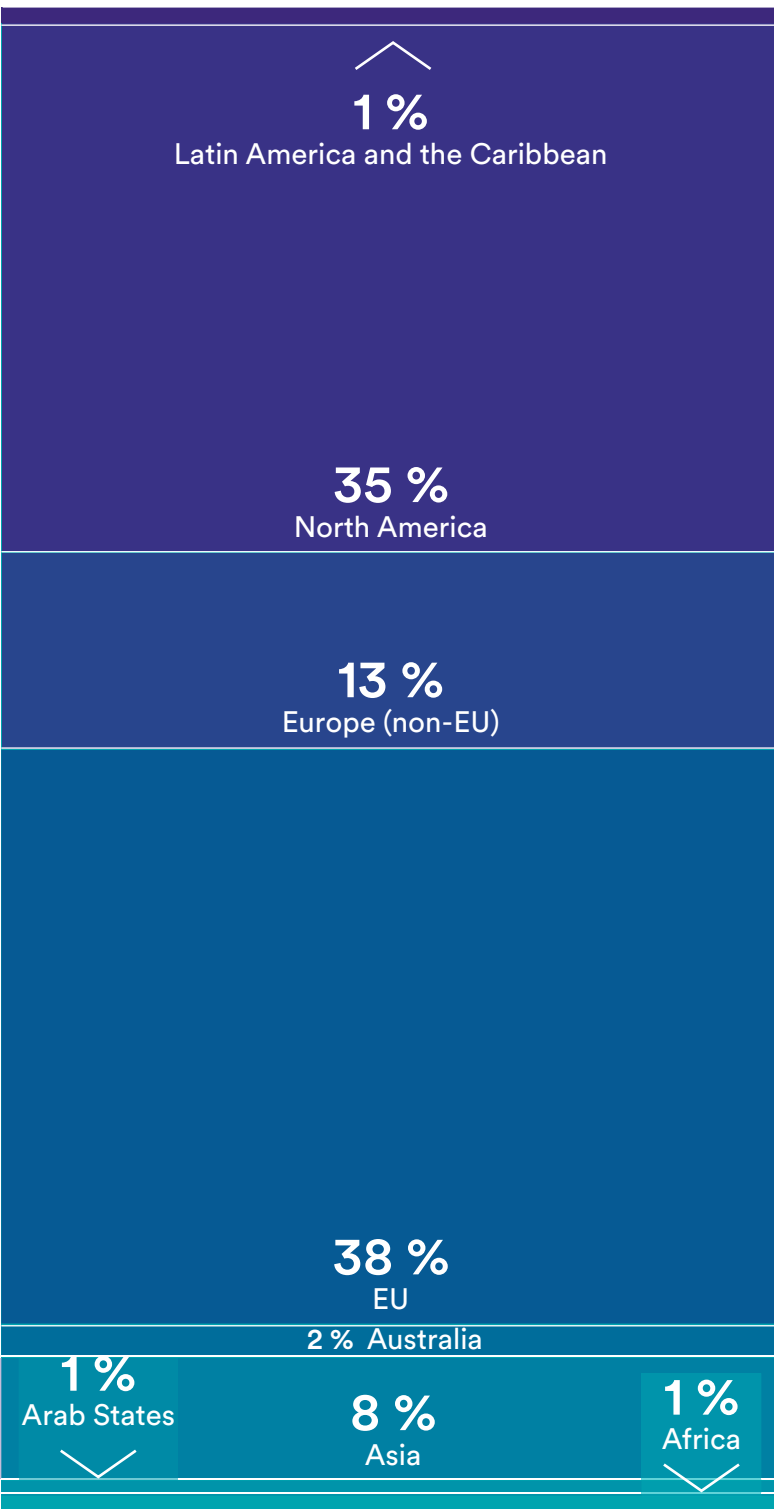
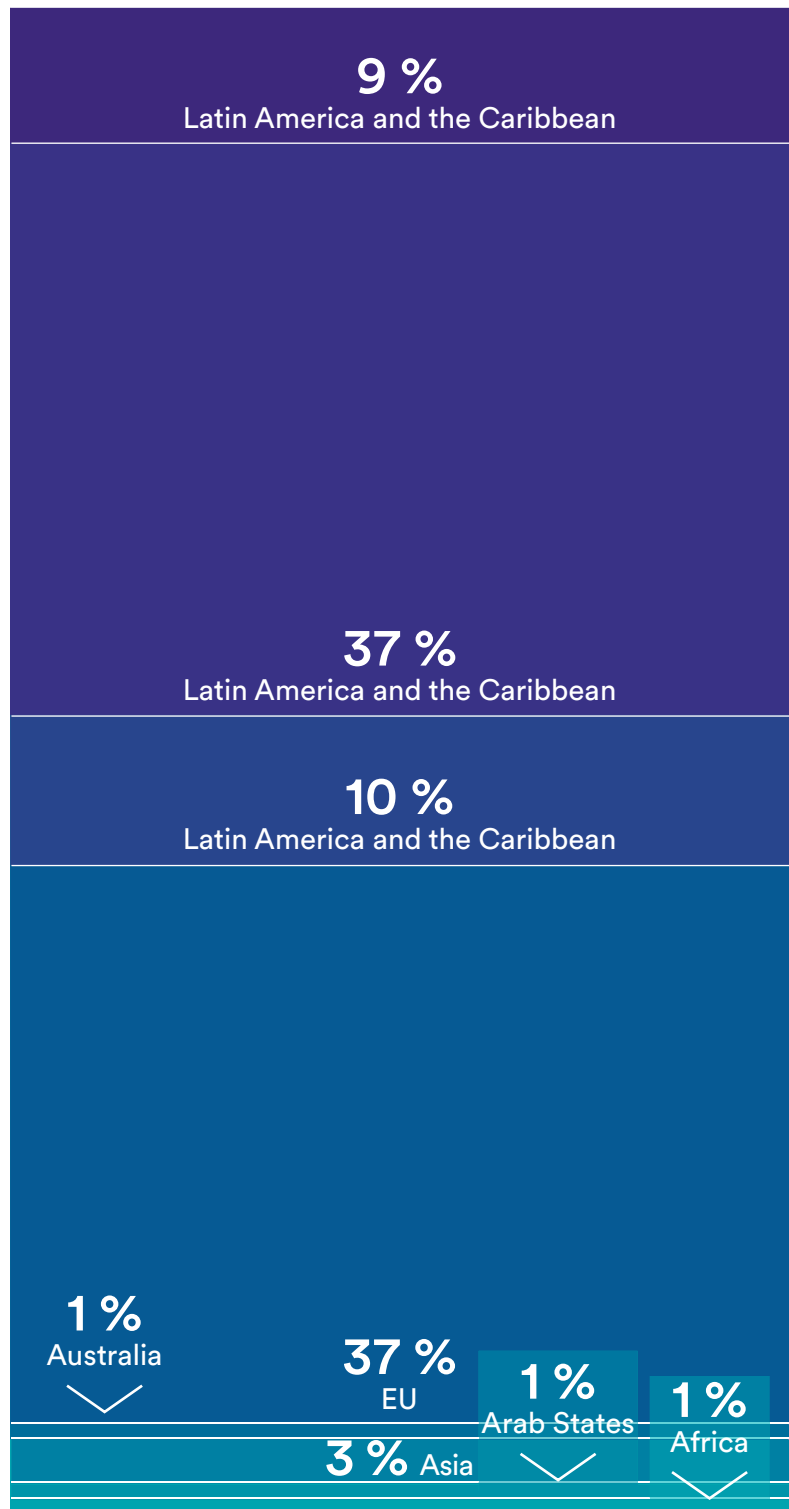


Figure 29b
Reported international revenue
by associated geographic region,
2021/22



Perennial Biennial

Liverpool Biennial

Perennial Biennial was a four-year partnership between 2018 and 2022 of five European Contemporary Art Biennials working together to develop and explore sustainable models for biennial practices.

“Our vision is to deliver meaningful art to local and international audiences, and international work is imperative to this. ”

The project, which was funded by Creative Europe, brought together Liverpool Biennial, Berlin Biennale, Riga International Biennial of Contemporary Art, Ljubljana Biennial of Graphic Arts and Bergen Assembly, to create a dynamic European platform of exchange. It supported research, writing and the formulation of new narratives in the biennial field through collaborative working, staff exchanges, and the sharing of expertise.

“The aim of the project was to strengthen the contemporary art sector at a global, European, and local level. ”

Working across multiple countries emphasised the importance of international exchange for Liverpool Biennial, particularly learning about how other biennials work with local communities and how they react to economic shifts.

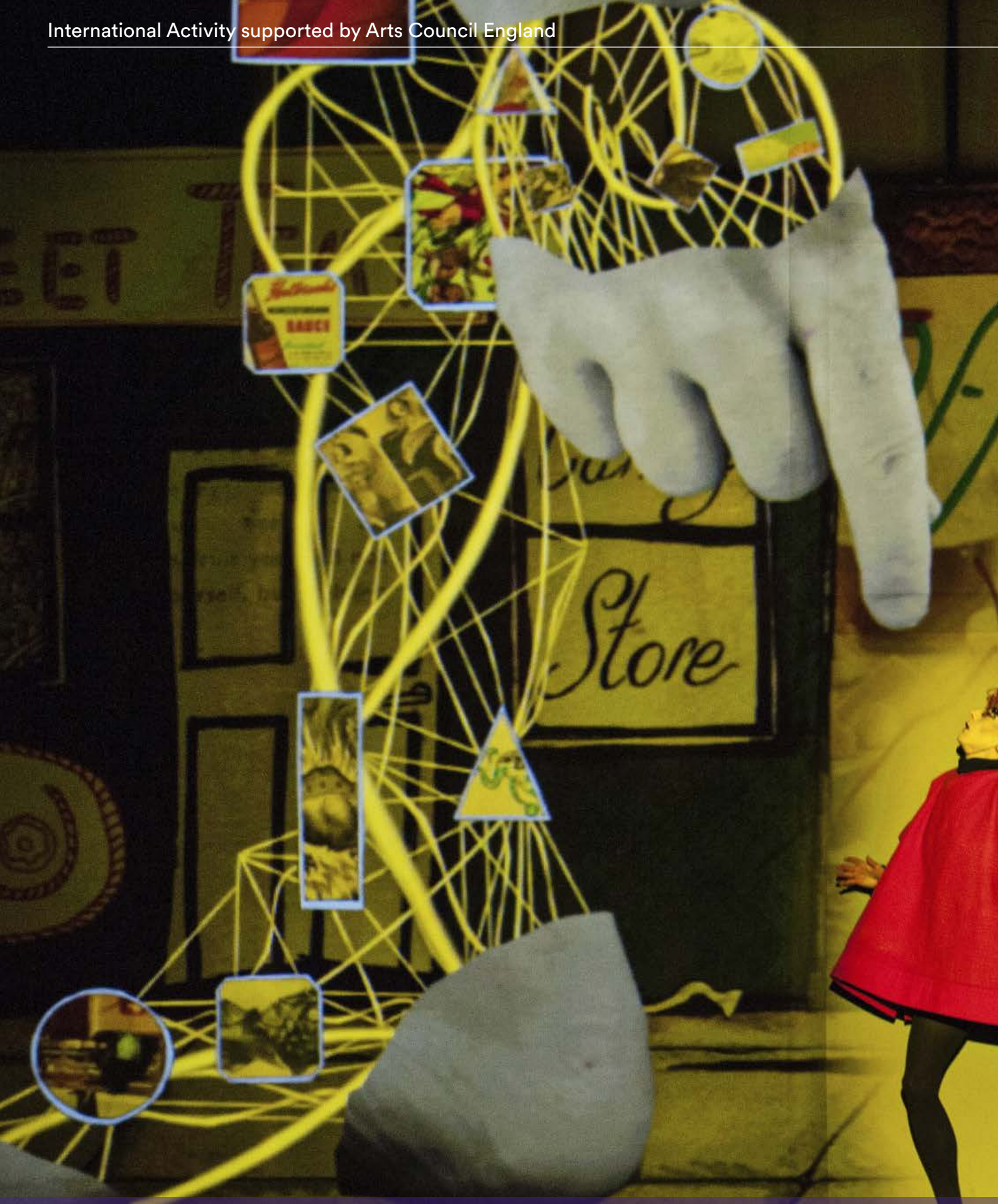
The project complemented Liverpool Biennial’s groundwork of skills and knowledge sharing. They were able to share their expertise with partners on touring logistics, including commissioning procedures, contract sharing and employment law, whilst also gaining an understanding of how it is done in a European framework.

The project increased their understanding and awareness of the political and arts context across Europe. Nonetheless, they intend to initiate links with regions such as Asia and Sub-Saharan Africa. They feel this is important in terms of recent geopolitical shifts in the UK, but also as it reflects their work in engaging with global experiences of marginalisation in relation to ethnicity.

“With the challenges that come with Brexit, seeking partners beyond Europe feels like a pragmatic response.”



(c) Pete Carr – Mohamed Bourouissa, Resilience Garden, Granby Gardening Club workshop – Liverpool Biennial 2018





6 Benefits, barriers and enablers

Internationally active respondents were asked to identify the key benefits, enablers, and barriers they have experienced in relation to international activity across the two data collection periods. This section outlines the results.

6.1 Benefits from international activity

A wide range of benefits were reported as arising from international activity. Among these, ‘artistic and professional development’ and ‘knowledge exchange and collaboration’ were the two most commonly reported benefits (see Figure 31).

Interviewees highlighted the benefits of maintaining networks internationally, alongside an increase in the diversity of artistic practice and enhanced understanding of the experiences of different communities and people.

“It’s about gaining a global perspective [...] exploring other cultures to evolve and further our own practice.”

Lindsey Hall, Real Ideas

6.2 Barriers to international activity

Unsurprisingly, pandemic restrictions were the most frequently cited barrier which hindered internationally active respondents from undertaking international activity between April 2018 and March 2022 (see Figure 32).

This was followed by a lack of funding or financial resource – the second most commonly reported barrier - and visas and work permits, which was the third. While financial barriers topped the list of barriers in 2014/15, visas were only the seventh most commonly cited barrier in that year, suggesting

the salience of this issue has increased over time. Of the 157 respondents who identified visas and work permits as a barrier, **83% said that Brexit was a contributory factor.**

Other barriers which respondents perceive as being influenced by Brexit include: customs and cabotage issues (91% of the 104 respondents who identified this issue said Brexit was a contributory factor), loss of access to EU funding (88% of 111 respondents), and tax and legal issues (77% of 77 respondents)²².

Changes in the UK's perception by European artists was also recognised by NPOs in the qualitative research. Interviewees highlighted an uncertainty that surrounds working in England, with European artists increasingly concerned by extra costs and workloads.

While cultural organisations are endeavouring to spread the message that England continues to welcome international artists, organisations feel it is important the government make strides in promoting a culture of openness for European artists.

“It’s important that the UK creates an environment that supports artists, which will be key in maintaining its global position.”

Sam Lackey, Liverpool Biennial

Meanwhile, some NPOs are seeking guidance and support from governmental departments in managing the challenges, restrictions and new legislations that have along with Brexit.

“We are interested in working with UK ministerial departments including the Department for Trade in relation to priority areas for the UK, and DCMS, and the Department for Transport to support the difficulties in relation to Brexit, such as cabotage.”

James Williams, Royal Philharmonic Orchestra

Respondents also highlighted the rising costs of touring and the need to plan ahead to account for unforeseen expenditure. For instance, The Royal Philharmonic Orchestra Eastern European Tour was funded by fees of the local promoters, and the Orchestra had to contribute a small amount from its own unrestricted reserves to make up for the shortfall due to increased operational costs such as travel, accommodation, and currency exchange fluctuations.

Decreased access to grants and an increased requirement to match funds was also highlighted as a significant hinderance to activity.

“There is becoming a greater requirement for performing arts organisations to bring more of their own money to the table due to the cost of touring escalating dramatically. It could therefore impact the future of touring – domestic and internationally.”

James Williams, Royal Philharmonic Orchestra

²³ Source: BOP Consulting 2022 Ref S5/ Table 3b.

²⁴ Julie’s Bicycle (2022) Culture, Climate and Environmental Responsibility: Annual Report2020 –21

Looking ahead, across a range of issues there was little optimism that some of these barriers will be eased in the near future.

Of those who identified the following as barriers, more than 80% expected them to remain in the next 1-3 years: lack of funding and financial resource; customs and cabotage issues; tax and legal issues; visa and work permits; concerns about environmental impact; exchange rates and comparative costs, and intellectual property, licensing, and data sharing issues²³.

More positively, 68% of respondents who identified pandemic restrictions as a barrier to international working felt that they would cease to be an issue within the next 1-3 years.

Whilst organisations did not report environmental challenges as a major barrier to international activity during interviews, they were conscious of its impact, particularly in relation to travel. Where some organisations were implementing sustainability into their core business strategies, others reported reducing their international travel, and opting instead to benefit from the growth in the digital landscape, as reported by Julie's Bicycle²⁴. For instance, Ad Infinitum Productions are thinking more strategically about their international activity and are working with environmental consultants from Green Energy Futures to help assess and reduce their carbon impact. They are actively identifying ways in which they can tour internationally in an environmentally sustainable way, in addition to engaging in meaningful digital activity.

6.3 Enablers to international activity

Across all respondents, **Arts Council England financial support was identified as the most significant enabling factor** which has supported them to undertake international activity over the research period (see Figure 33).

For NPOs, it was the second most commonly report factor after overseas reputation, but this still represents a jump from fifth in 2014/15. This indicates that Arts Council support is more crucial than ever, given the challenging economic climate cultural practitioners and organisations are navigating.

Other significant enabling factors identified were experienced staff or board members; membership of international networks and proactive marketing and promotion.

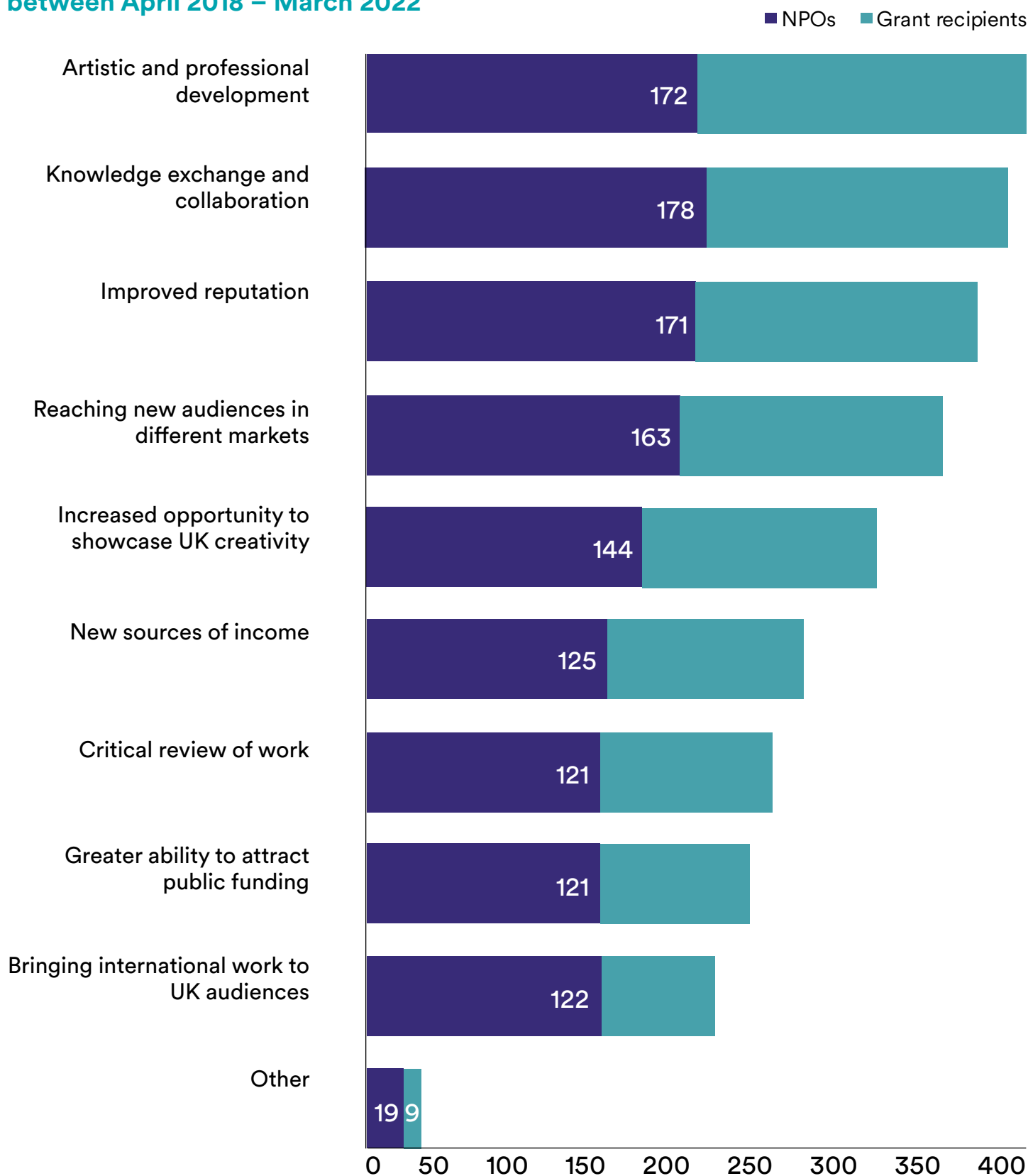
Data from the qualitative research also highlighted how collaborating with multiple partners, cultural institutes, and networks – domestic and international – has enabled NPOs to access shared audiences, expertise, and funding.

Interviewees said their international ambitions may not have been achievable without the forging of relationships made possible by working with partners.

“We’ve worked with various cultural institutes including Culture Ireland, Catalan Arts, The Finnish Institute, and EUNIC – the European Union National Institutes for Culture – who have been incredibly supportive in helping us promote and represent emerging international voices”

Andrew Loretto, Play to the Crowd

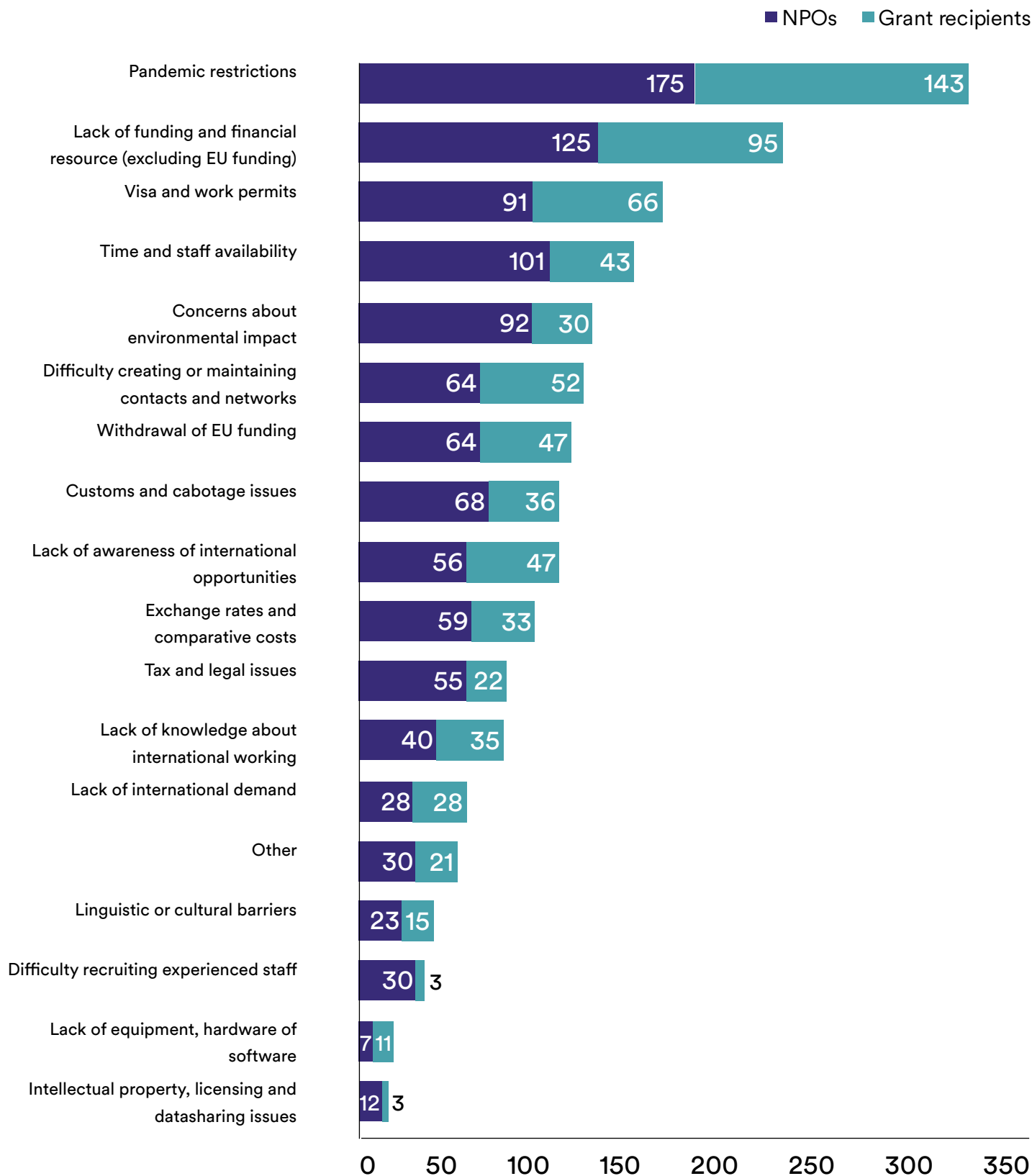
Looking ahead, dedicated, and long-term funding was the most significant factor respondents identified as having the capacity to support them to undertake more international activity in future. Other significant factors included guidance about international opportunities; support to develop contacts and networks and greater ease obtaining visas and work permits.

Figure 30**Reported benefits arising from international activity, all respondents between April 2018 – March 2022**

Source: BOP Consulting 2022 Ref S5/ Table 1a.

Figure 31

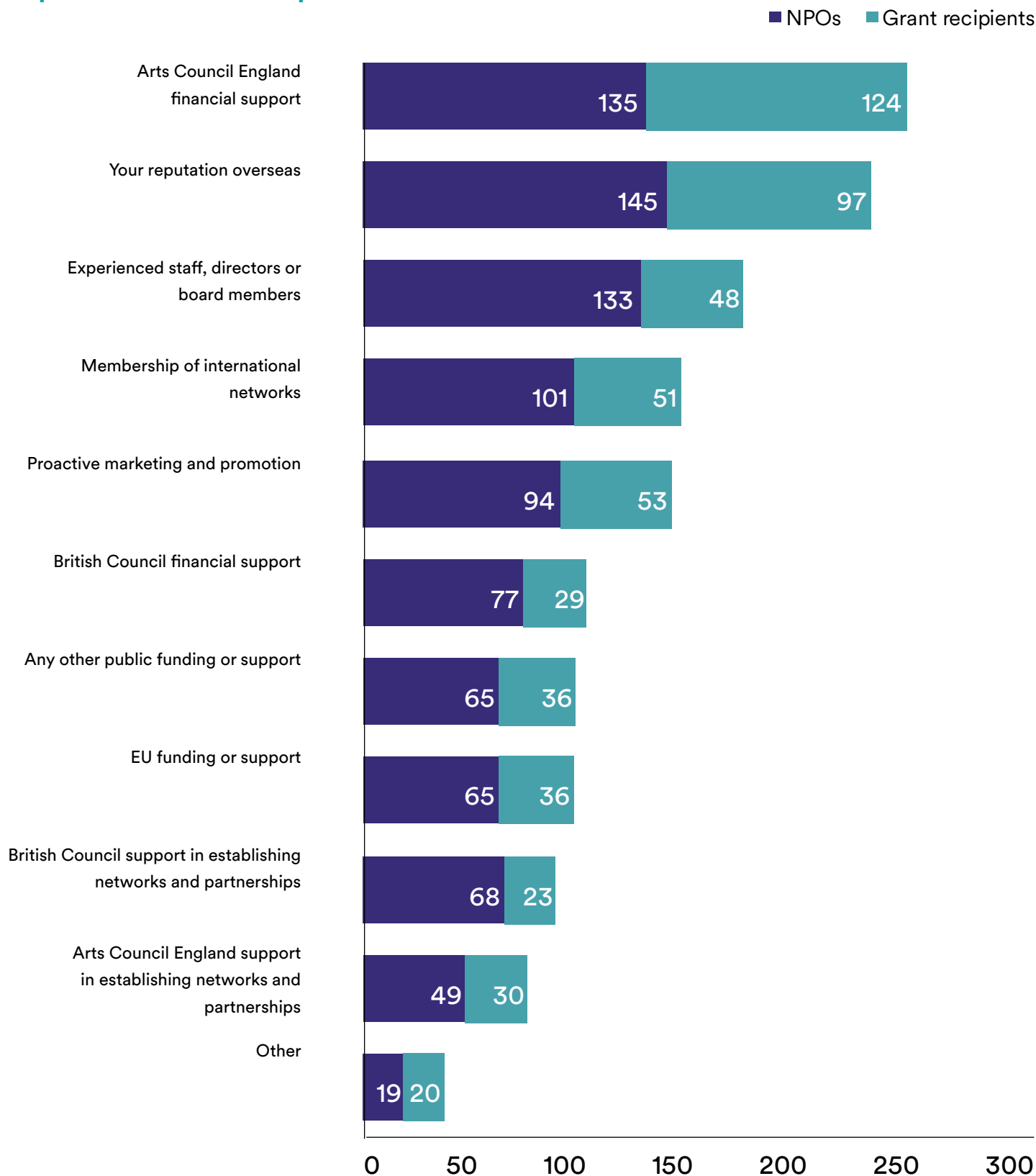
Reported barriers to international activity, all respondents between April 2018 – March 2022



Source: BOP Consulting 2022 Ref S5/ Table 3a.

Figure 32

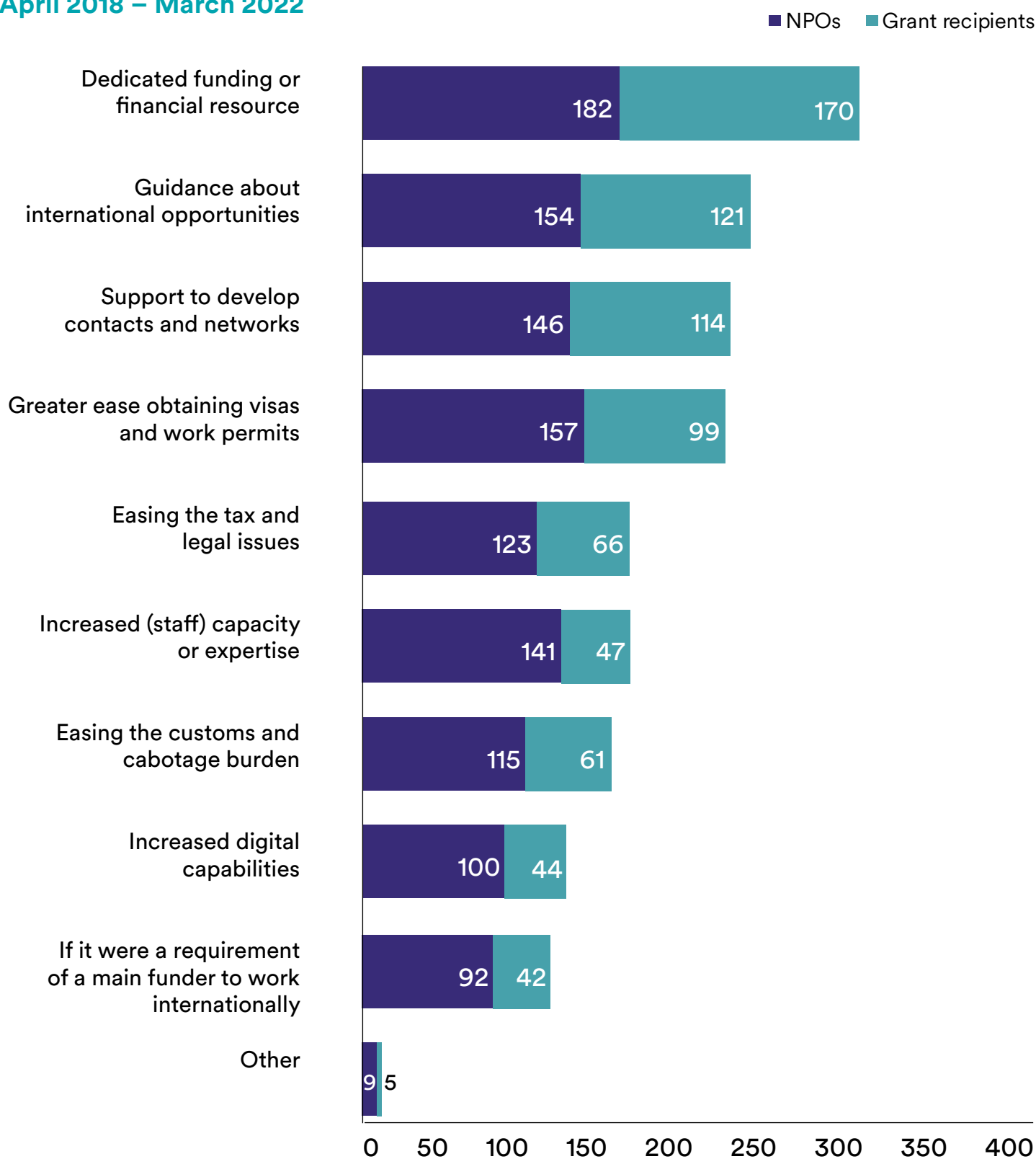
Reported factors which have enabled international activity, all respondents between April 2018 – March 2022



Source: BOP Consulting 2022 Ref S5/ Table 2a.

Figure 33

Reported factors which would support organisations and practitioners to undertake more international activity in future, all respondents, between April 2018 – March 2022





7 Internationally inactive respondents

7.1 Internationally inactive respondent profile

While over half of all respondents reported no in-person activity between 2018 and 2022, more than one third of this cohort had undertaken international activity before 2018.

Across the 859 respondents who took part in the survey (NPOs and grant recipients), 475 (55%) reported undertaking no international activity involving the physical movement of people or works between April 2018 and March 2022.

Of these, **65% (311 respondents) had not undertaken international activity at any point in the past**, whereas the remaining 35% (165 respondents) had undertaken international activity before, but not since 2018.

We also found that **37% (167 respondents) of those who did not undertake physical international activity reported undertaking virtual activity** over the data collection period.

Respondents who had not undertaken in-person activity across the data collection periods – referred to in this section as ‘internationally inactive respondents’ – were surveyed to understand what they identified as the key barriers to working internationally, and what might support them to do so in future.

7.2 Barriers and enablers

Perhaps unsurprisingly, given a challenging economic climate and the disruption caused by Covid-19, ‘lack of financial resource’ and ‘pandemic restrictions’ were the two most frequently cited barriers to working internationally among the internationally inactive cohort (see Figure 34).

However, the third and fourth most frequently reported barriers among this group were a lack of awareness of international opportunities and a lack of knowledge about international working.

Correspondingly, internationally inactive respondents identified ‘dedicated funding or resource’ and ‘guidance about international opportunities’ as the two most significant enablers that would support them to undertake in-person international activity in the future (see Figure 35).

7.3 International readiness

Internationally inactive respondents were asked a series of questions relating to international arts and cultural activity to assess their ‘readiness’ to work internationally. These questions were adapted from ‘export readiness assessments’ used by governments and trade organisations to help businesses determine if they have the capacity and resources to enter international markets²⁵.

Questions covered the respondents understanding of their work in an international context and level of international demand as well as their internal expertise and resource.

Respondents were then provided with an overall international readiness ‘score’ based on their responses, which has been used to determine their international readiness.

As per Figure 36, over half (58% or 274 respondents) of this cohort showed low levels of international readiness. However, 12% (57 respondents) showed high or very high international readiness.

Despite low levels of international readiness, **45% internationally inactive respondents said they planned to undertake physical international activity in the future.**

Figure 34

Reported barriers to undertaking international activity among inactive organisations/ professionals, between April 2018 – March 2022

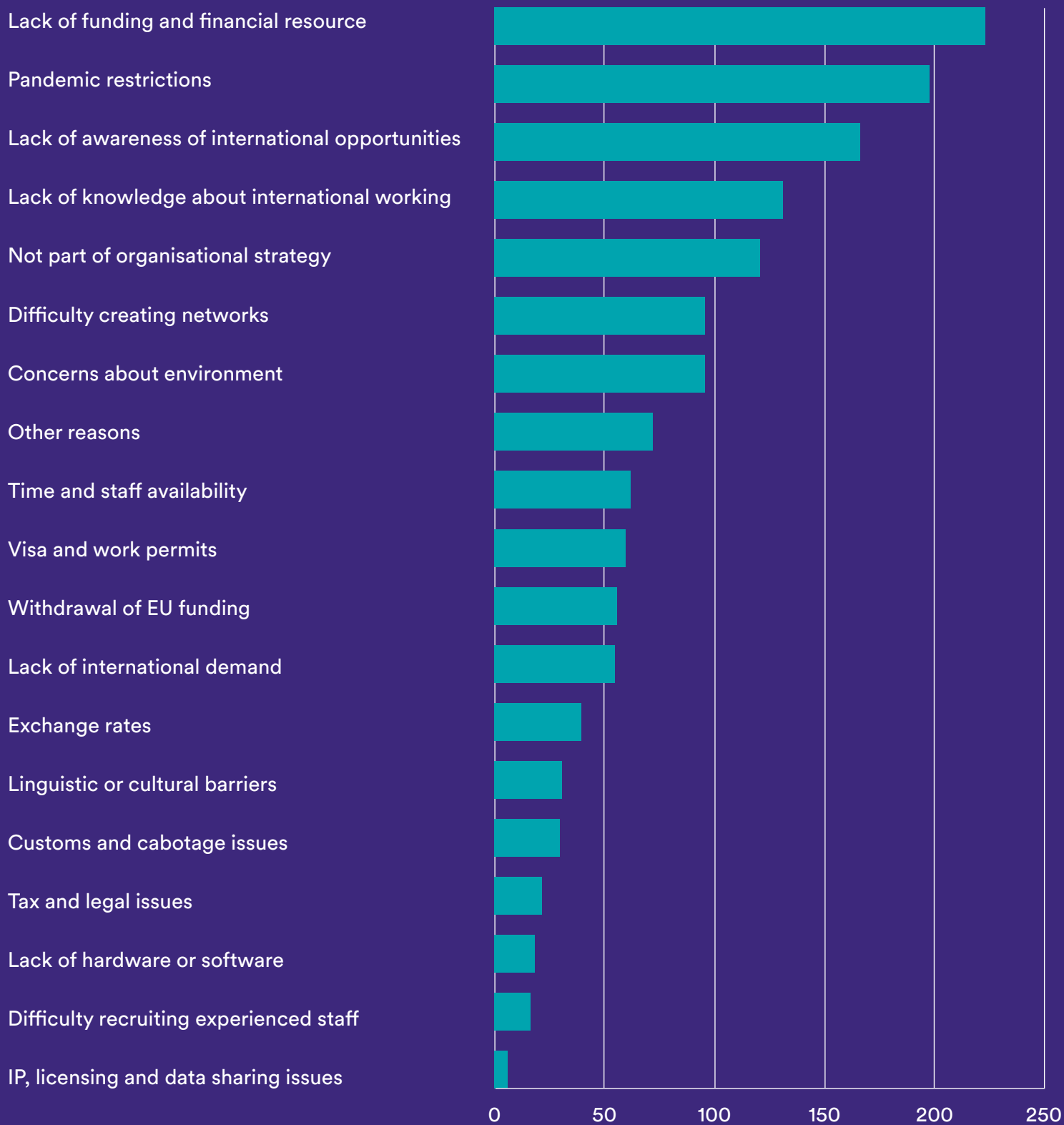
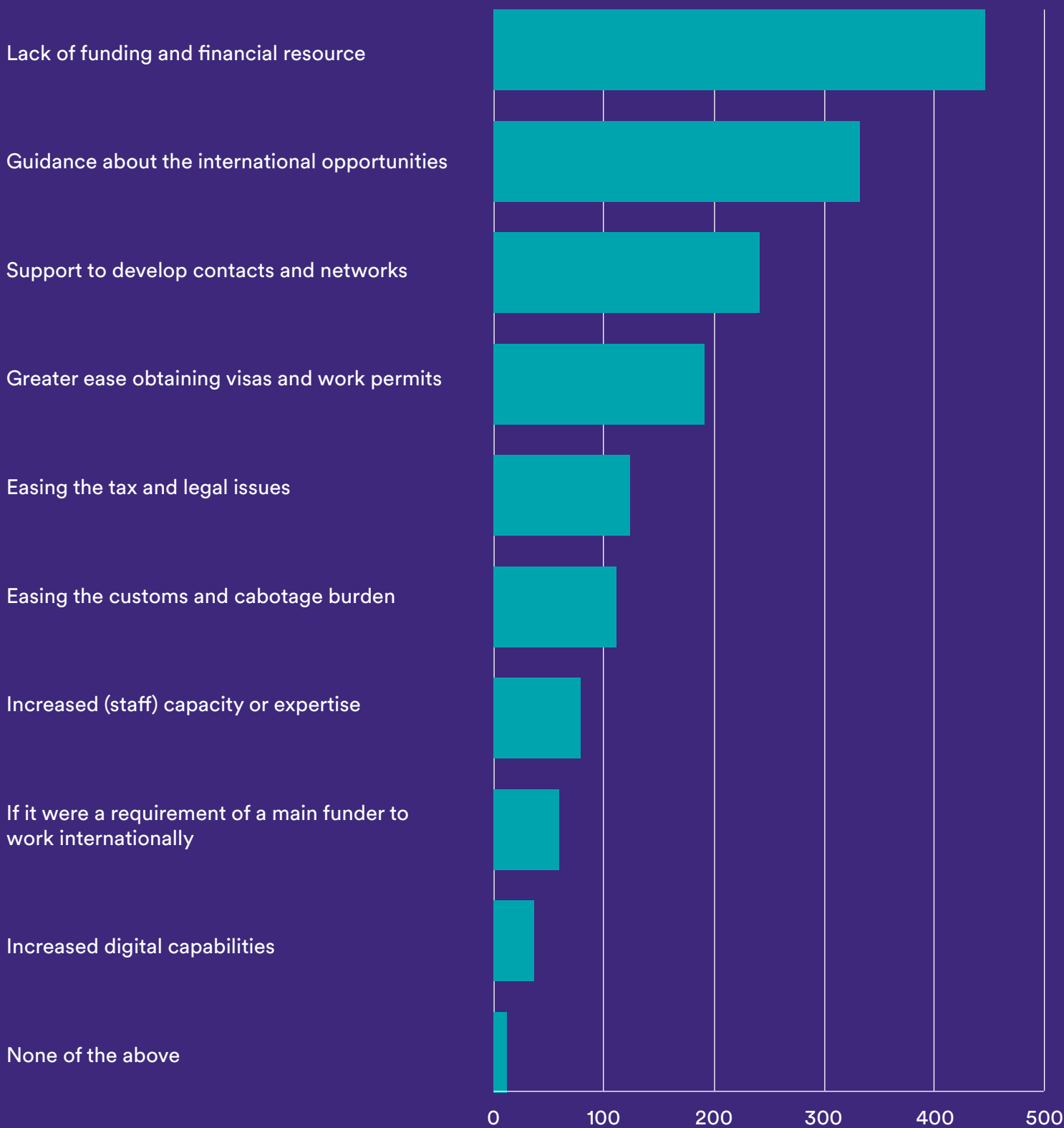


Figure 35

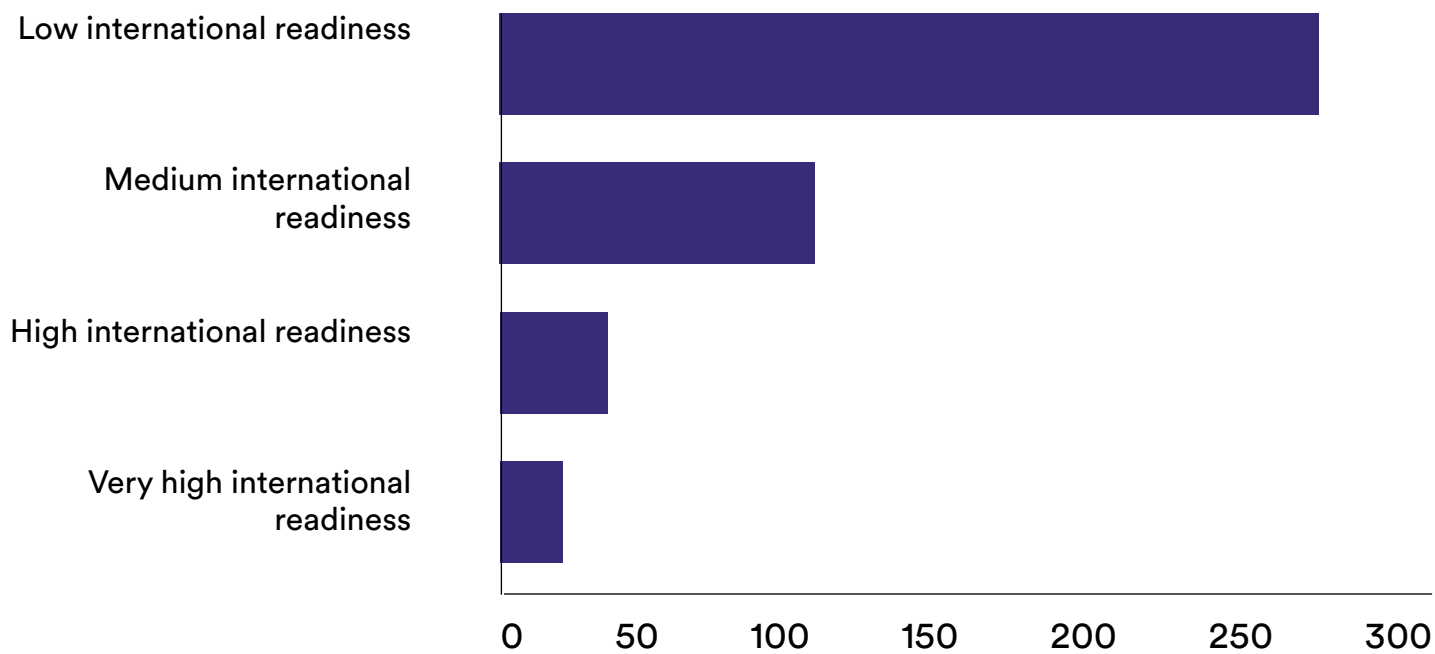
Perceived enablers to undertaking international activity among inactive organisations/ professionals, between April 2018 – March 2022



Source: BOP Consulting 2022 Ref S5/ Table 1b n = 474

Figure 36

International readiness of internationally inactive respondents, 2021



Source: BOP Consulting 2022 Ref S5/ Table 1a n = 435



8 Conclusions

The pandemic has had a severe impact on the international activity of England's cultural ecosystem. Beyond this, organisations and practitioners are facing a challenging economic, regulatory and trade context, and concerns about the environment are becoming more salient. While Covid-19 is a big part of the story, the volume and revenues of international activity were already in decline before the onset of the pandemic.

However, the results also show how the cultural sector has adapted to difficult circumstances and the continued significance it places on international connections. This is perhaps most evident in the sharp increase in virtual activity that could be observed following the start of the pandemic. This activity was also found to bring new opportunities, both in terms of the size of organisation that has been able to take part, and the countries and territories they have connected with.

While digital technologies have opened up new possibilities to connect globally, the European Union remains the most significant region for international activity of English arts and cultural organisations and practitioners post-Brexit – both in-person and virtually – demonstrating enduring cultural ties with England's closest neighbours.

As for the 'why' – the desire to push artistic boundaries and to exchange with other artists and cultures across the world continue to be the most significant motivators for international activity, highlighting the contribution this activity makes to England's cultural richness.

Both challenges and opportunities lie ahead. Among those who did not report any international activity, a significant number said they had intentions to work internationally in the future. However, there is little optimism among research participants that the financial and regulatory / trade barriers they identified will improve in the near future. What is clear is that Arts Council England support is more important than ever before in helping organisations and practitioners to stay connected.



(c) Joel Chester Flides – Monkey Journey to the West

Appendix A

Case study interviewees

Name	Organisation	Date
Jonathan Harper	Paraorchestra and Friends	7th October 2022
Alison Woods	NoFit State	11th October 2022
Cat Moore	New International Encounter	12th October 2022
Lucy Macnab	Forward Arts Foundation	13th October 2022
Rhiannon Ewing James	British Ceramics Biennial	18th October 2022
James Williams	Royal Philharmonic Orchestra	19th October 2022
Joe Turnbull	Disability Arts Online	19th October 2022
Charlie Morrison	Walk the Plank	19th October 2022
Caroline Miller	Birmingham Royal Ballet	24th October 2022
Samantha Lackey	Liverpool Biennial	24th October 2022
George Mann	Ad Infinitum Productions	25th October 2022
Lise Smith	Shobana Jeyasingh Dance	31st October 2022

Appendix B

In-depth interviews interviewees

Name	Organisation	Date
Andrew Loretto	Play to the Crowd	22nd November 2022
Lindsay Hall	Real Ideas Organisation	28th November 2022
Chris Gribble	National Centre for Writing	30th November 2022
Sorrel Hershberg	Create London	2nd December 2022
Kirstie Hamilton	Sheffield Galleries & Museums Trust	13th December 2022
David Jones	Serious Events	19th December 2022

BOP Consulting is an international consultancy specialising in culture and the creative economy.

London
LABS Southampton Place,
15 Southampton Place, London
WC1A 2AJ

Web
www.bop.co.uk

Twitter
[@BOP_Consulting](https://twitter.com/BOP_Consulting)

Blog
www.bop.co.uk/articles