
Achieving great art for everyone

A review of research and literature to inform the Arts Council's 10-year strategic framework
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1 Introduction

In October 2006 Arts Council England launched the arts debate, a major programme of qualitative research into the arts and their funding. The results of the arts debate informed the Arts Council's current plan (2008–11) and in particular the adoption of a new mission – Great art for everyone – and the five outcomes that underpin it – excellence, innovation, diversity, engagement and reach.

In 2009 the Arts Council embarked on the process of building this new mission and the five outcomes into a strategic framework to guide its activities and its work with partners for the next 10 years. As part of this process the Arts Council conducted a review of recent literature, incorporating the arts debate findings and a wide range of additional material relating to the arts in the UK today.

The purpose of the literature review was to inform the development of the Arts Council's 10-year strategic framework, including the identification of long-term goals, by:

- exploring the political, economic, social and cultural context in which the arts in England operate today
- identifying challenges and opportunities that the arts and the Arts Council may face in the future

- examining the views of arts practitioners, experts in the arts and related sectors and members of the public on how the arts need to develop
- identifying lessons to be learned from past experience

The review took place between March and November 2009 and covered a range of different types of literature including quantitative and qualitative research, evaluations and case studies, consultation reports, policy and strategy documents, opinion pieces and critical commentary. The selection of literature was weighted towards cross-cutting reports with a high degree of policy relevance, particularly those that had been commissioned or carried out by the Arts Council to inform its own activities and to understand how public money can best be invested in the arts. As a result of the range of literature covered in the review, quality varied in terms of rigour of scientific design. A large amount of 'grey' literature was reviewed, including material representing expert opinion and the views of artists and arts organisations as well as robust empirical research. There was less of a focus at this stage on peer-reviewed, published academic work.

In terms of content, the review focused on the infrastructure and forms of support required for artistic practice to flourish for the wider public good. As a result, detailed studies of the artistic process itself and developments in practice in particular artforms were considered outside the scope; artform specific analysis is provided in an accompanying document as part of the consultation process. The review considered issues of public engagement and benefit in some detail; it did not, however, attempt to provide full evidence of the impact of the arts, as this has been well documented elsewhere (Galloway, 2008). Given the resources available, the review was largely confined to literature on arts policy and practice in the UK.

This report presents a summary of what the Arts Council learned through the literature review. It is published as a supporting document as part of the Arts Council's formal consultation towards developing its 10-year strategic framework, to help respondents to assess the proposed framework against the available evidence and to provide signposts to further information.

Chapter two of the report sets out some of the wider changes taking place in society and the economy and the challenges and opportunities they present for the arts. Chapter three summarises what the literature had to say about the role of arts funding and development. Chapter four considers some of the available evidence in relation to each of the Arts Council's proposed long-term goals. Chapter five offers some concluding thoughts on the nature and quality of the evidence base and recommendations for future research. A detailed description of the methodology used to undertake the literature review can be found in appendix one, including an account of how the results have been used to inform the development of the Arts Council's strategic framework so far. A full list of references is provided in appendix two.

2 Challenges and opportunities for the arts

2.1 The arts economy

Today, 'creativity' has become a widely promoted – if not always well-defined – concept in UK public policy and in society more widely. Much of the literature argues that creativity is key to national prosperity, enabling the UK to compete in an increasingly global economy, and that there is a need to foster a more creative national culture and to exploit the UK's creative assets more fully (Cox, 2005; Department for Culture, Media and Sport, 2008a). Alongside creativity, innovation – the exploitation of new ideas – is seen as a key driver of growth, and much recent public policy has been concerned with investing in the education, skills and research and development required for a flourishing 'knowledge economy' (Department for Innovation, Universities and Skills, 2008).

There is now a considerable body of evidence on the value of the creative industries to the UK economy and in Europe more widely. In 2003 Europe's cultural and creative sector had a turnover of more than €54 billion, contributing to 3% of EU Gross Domestic Product. The overall growth of the sector's value-added was 20% in 1999–2003, which was 12% higher than the growth of the general economy (KEA European Affairs et al, 2006). In 2007 the UK's creative industries were estimated to make up 7% of the economy with two million people employed in creative jobs (Department for Culture, Media and Sport, 2008a). Further, the UK creative industries

contribute a greater proportion of GDP than any other nation with a workforce growing at a faster rate than average.

The arts are increasingly seen not just as a sector in their own right, but as a core element of a wider cultural sector. This is in turn a subset of the creative industries, which have their own location within the overall economy (The Work Foundation and National Endowment for Science, Technology and the Arts, 2007). While practitioners may not necessarily recognise or affiliate themselves with this 'creative economy' concept, it may be useful from the perspective of public policy, enabling artists and arts organisations to be recognised as economic forces and aiding understanding of the resources both public and private that fuel artistic production and consumption.

The arts in England today can be thought of as a rich and complex ecology comprising commercial activity; individuals, organisations and projects funded by the public sector including the Arts Council, local government and other bodies such as the BBC; activity supported through private investment such as business sponsorship, donations and grants from trusts and foundations; arts in the voluntary sector; and a wide range of amateur and informal activity undertaken by individuals and groups in their leisure time.

There is a growing but insufficient body of literature attempting to map this ecology and understand the relationships between different parts of the system, and between the arts and

wider ecologies. Much of this literature explores the way in which the arts straddle the commercial and public sectors, with evidence that artists and creative practitioners work fluidly across the two and across industries, switching between multiple roles and balancing a portfolio of activities (Institute for Employment Studies, 2009). There is some exploration of the relationship between the commercial and public sectors, with evidence of a mutual dependence. For example, commercial theatre producers are reported to have been 'unequivocal' that the success of commercial theatre depends on creative talent developed in the publicly funded sector (Peter Boyden Associates, 2001), while conversely many visual artists see commercial galleries as essential showcases for their work before being able to display in publicly funded arenas (Buck, 2004). It has been argued that distinctions between the commercial, public and voluntary sectors are breaking down entirely (Arts Council England, 2000), with artists becoming increasingly entrepreneurial and some arts organisations operating as successful businesses, public service providers and community spaces.

While some question the extent to which the market is an appropriate mechanism for the validation of art (Lind and Minichbauer, 2005), the generally accepted view in the literature is that the UK cultural sector overall operates a healthy mixed economy with an effective balance of public and private funds and a greater diversification of income streams than European counterparts (FreshMinds, 2008a). However, one immediate and pressing question is the extent to which the current recession will impact on the health and sustainability of this mixed economy.

At the time of carrying out this review there was little evidence to enable reliable forecasting of the potential impact of the recession on the arts. What evidence there is suggests that most arts organisations are managing to maintain levels of earned income through the box office and other ticket sales (Arts Council England, 2009b). This trend is demonstrated in the wider cultural sector. In 2008 cinema admissions were up 1% on the previous year, while box office receipts were up 3.5% (UK Film Council, 2009). However, there is evidence of at least a short-term drop in income from corporate sponsorship and trusts and foundations (Mermiri, 2009). Critically, there

is an urgent and widely accepted need to reduce the UK public spending deficit over the lifetime of the Arts Council's proposed 10-year strategic framework, which could have a major and far from foreseeable impact on the arts economy as a whole.

At the same time, there may be opportunities for the arts sector presented by the recession in terms of encouraging innovation, particularly in business models and organisational collaboration. There is potential to tap into additional resources through fixed commitments such as the Olympic Games and emerging initiatives such as the creative use of vacant spaces in town centres. It has been argued that the arts have the ability to help understand and tackle the social consequences of recession, and that creativity will be more important than ever in the new, post-recession economy (Department for Culture, Media and Sport, 2009b).

2.2 Changing communities

The arts economy and ecology is developing in the context of demographic change. The UK population continues to grow and to get older, with baby boomers moving into retirement, relatively smaller generations of people born since the mid-1970s and people living longer. In 2006/07 local authorities spent £20.1 billion on personal social services, more than double compared with a decade previously, with 43% directed at older people (Office for National Statistics, 2009). However, research suggests that the country is ill-prepared for the challenges of this aging population in terms of the increased poverty, ill-health and social isolation it will bring, and the corresponding impact on the cost of public services (Harris, 2009).

An aging population has implications for audience profiles in the arts. Older people are currently more likely to attend arts events, particularly more established forms such as theatre, art exhibitions and opera, where the over-60s are more likely to engage than any other age group (Chan et al, 2008a, 2008b, 2008d). In addition, there are opportunities for the arts to engage older people in social activities that help them to continue to develop and deploy their creativity and skills. However, there is not yet enough evidence to

forecast whether and how the artistic tastes and preferences of young and middle-aged people today will change as they grow older, and arts organisations will need to consider carefully how they can remain relevant to different generations.

Net migration to the UK remains an important factor in population growth (Office for National Statistics, 2009) and UK society is becoming more diverse – data from the 2001 census show that the fastest growing ethnic group among under-16s today is those of mixed ethnicity. Diversity continues to be a significant and positive challenge for the arts. It has long been seen as an essential condition for artistic vibrancy and progression (Webber and Challans, 1992), and the arts are perceived as one of the ways in which individuals and communities can understand themselves and each other (Creative Research, 2007; European Commission, 2007). However, the arts workforce remains unrepresentative of the population as a whole, and there are long-standing debates about how best to support practice and talent among diverse groups within the wider context of arts development (see section 4.2).

Lifestyle patterns are changing too. The proportion of one-person households is increasing, people are living with their parents longer and getting married later (Office for National Statistics, 2009). Time spent in education is increasing and there has been a growth in the population educated to tertiary level. It is likely that this has had and will continue to have a considerable impact on the ways in which the arts are produced and consumed. There is now extensive evidence of the importance of education, particularly tertiary education, in determining the likelihood of an individual attending and participating in the arts (Bunting et al, 2008). Over time a more educated nation may also become a more artistically engaged nation.

However, while there has been a growth in education there is little evidence to date of any corresponding increase in social mobility. Much of the literature points to the consistent presence of socio-demographic inequalities and there remain deep divides in the ways in which people in England experience life (Office for National Statistics, 2009). These divides are reflected in long-standing patterns of arts engagement which are sharply differentiated along socio-economic

lines, with the highest levels of engagement found among the most affluent groups (Bunting et al, 2008). As in many other sectors, there are real challenges for the arts in reaching out to less privileged parts of society. At the same time, there continue to be opportunities for artists and arts organisations to both reflect and help tackle deep-rooted and challenging social problems.

The changes taking place in the population as a whole have an important geographic dimension, with a diversity of communities and large variations in levels of economic prosperity and social welfare across the country. In particular, urban and rural communities are changing in different ways. For example, while the population overall is aging, data from the 2001 census show that the UK's major urban areas have a considerably higher than average proportion of 16–24 year olds, including students. Recognising that different places are made up of different kinds of people with different characteristics and challenges, public policy has increasingly sought to meet the needs of communities at local level (HM Treasury, 2007). There is a desire for decisions about how best to meet a particular community's needs to be made as close to the ground as possible, and, in the context of low voter turnout and growing mistrust of politicians, for greater power to be placed directly in the hands of citizens and communities.

Decentralisation and localism are now terms in wide use by all the major political parties, if not necessarily always reflected in the realities of policy making. Recent reforms have sought to devolve greater power to regions and sub-regions and there is an increasing focus on the role and importance of local authorities (HM Treasury, 2007). A guiding principle has been that local authorities can best meet the needs of the communities they serve if they are responsive and accountable to local people. As such, local authorities are striving to achieve the outcomes that are most important to their communities through joined-up service delivery and greater involvement of local people in establishing priorities and deciding how resources should be spent.

As a counterpoint to the dominance of global brands and the prevalence of 'clone towns', local authorities are seen to have a role as 'leaders of place' (Department for Culture, Media and Sport

2 Challenges and opportunities for the arts

and partners, 2008), developing thriving, vibrant places with a strong sense of local identity where people have a stake in their community. In some places people are starting to take matters into their own hands, taking ownership of local assets and determining for themselves how their public spaces will be used.

There are opportunities for artists and arts organisations to help meet the needs of local communities as part of a joined-up, collaborative approach to service delivery and by shaping and encouraging a sense of place and identity in local areas. Local authorities are already major funders of the arts, and many arts organisations operate across a range of social and economic agendas with public, private and voluntary partners. There is scope for the arts to become much more integral to local life. However, this relies on artists and arts organisations having a deep understanding of and being responsive to the communities in which they work and being able to navigate the systems of local government and local service delivery.

2.3 Empowered consumers

Perhaps the most radical shift that will impact on the arts is the change in consumer behaviour and expectations. Literature from the consumer research base demonstrates how the structures of people's lives are changing. People today work long hours and are presented with an increasing array of consumption choices, resulting in growing constraints on leisure time (Arts Council England, 2000). Commentators point to the growth of the 'experience economy', fuelled by a desire for more sustained, challenging interactions (Leadbeater, 2005; Knell, 2006). Further, people today are more demanding and vocal in relation to the goods and services they consume than they have ever been before. They have rapidly increasing access to information, are less deferential to traditional forms of authority and expertise and in some sectors, particularly technology, are starting to take the reins as producers as well as consumers. Organisations in both the public and private sectors have responded to and shaped this trend with a greater emphasis on tailored, 'personalised' experiences and the development of new ways of engaging and collaborating with

their constituencies. Consumer aspirations for products and services that are better shaped to their particular needs are driving user-led innovation – the implementation of new ideas through direct collaboration with consumers (Technology Strategy Board, 2008).

In the arts, traditional notions of authorship and production are being questioned. Knell (2006) argues that a 'democratisation' of culture is taking place, with people increasingly able to express their creativity and shape their cultural experiences in ways that are meaningful to them. For some commentators the arts are no longer, or have never been, a formal establishment but rather an integral part of everyday life (Joss, 2008). At the same time, there are those who argue that UK culture is not democratic enough (Holden, 2008), noting the persistent inequalities in levels of arts engagement, particularly in more formal, established activities (Bunting et al, 2008). As individuals increasingly take charge of their own creative experiences, and audiences for the arts become more fragmented, there are major challenges for artists and arts organisations in remaining relevant and responsive. However, there are also opportunities for new forms of engagement and dialogue to drive innovation in artistic practice and product.

2.4 Digital revolution

The changing dynamic between producer and consumer and the blurring of the boundary between audience and content creator are being fuelled by the rapid growth in digital technologies, and the impact this is having on the ways in which people access information, consume, communicate and interact. The UK is becoming digital. In 2008 87% of homes had a digital television and in 2007 78% of households owned a mobile phone, while 61% had an internet connection. Nearly 50% of all those aged 8–17 in the UK who use the internet had a page or profile on a social networking site in 2007 (Office for National Statistics, 2009). While there are significant socio-economic inequalities in levels of internet access, current policy is focused on improving digital participation, with a commitment to universal broadband access by 2012 and rapid improvements planned for the

infrastructure of both broadband and 3G mobile technologies (Department for Culture, Media and Sport and Department for Business Innovation and Skills, 2009).

Digital technologies are having a major impact on the creative industries. The fundamental challenge for creative businesses is to find new ways to make money from their content. There are a number of complex and well-documented challenges relating to piracy, illegal file-sharing and the value of intellectual property, which policy-makers are now beginning to grapple with. Sweeping changes are taking place in the media landscape and a major change in public service broadcasting models is anticipated (Ofcom, 2008). Digital technologies allow for a wider range of content developers to enter the field and for more innovative commissioning of public service content. The emphasis for content providers is on convergence across platforms, the development of multi-platform content and increased operability between platforms – all with a view to targeting new audiences and increasing audience interaction (Technology Strategy Board, 2008).

Digital technologies present both opportunities and challenges for the arts. A number of major online cultural brands such as Tate and the Royal Shakespeare Company are emerging with global potential (Department for Culture, Media and Sport and Department for Business Innovation and Skills, 2009). New approaches to commissioning public service content and the growth in digital screens and public broadcast spaces offer major opportunities to extend audiences and grow revenue. A number of artists are working intensely with digital forms, and a small number of organisations and networks are starting to develop highly interactive online spaces for 'extreme' creative collaboration (Tom Fleming Creative Consultancy, 2009). Digital technologies are creating opportunities for new forms of participation, with young people in particular having access to both the hardware and software required to create and upload their own creative content.

However, it is acknowledged that the publicly funded arts sector is a long way from seizing the full potential of digital opportunities (MTM London, 2009). For arts organisations that are part commercial and part publicly funded, there are possible tensions between using digital

technologies to offer universal access to their content and developing digital distribution channels to generate greater revenue from an artistic work or production. It has also been argued that technology may place a greater premium on live arts as 'real' and communal experiences, and with technology breaking down the barriers of international exchange, local and community-specific arts may gain new currency (Arts Council England, 2000).

2.5 Climate change

Finally, the literature provides a reminder that, regardless of social, economic and political shifts, the changes that are taking place to the planet will mean preparing for a radically different future (Forum for the Future and Hewlett Packard Labs, 2008). The current government target to reduce CO₂ emissions by 80% by 2050 will have an impact across the public sector and all organisations will have to rethink how they do business and operate in the world. The arts sector may need to prepare for potentially profound changes in levels of travel and international trade and in the ways in which public spaces are conceived and used. At the same time, there is discussion of the extent to which both environmental and economic breakdown will lead the way to a different approach to public policy that forefronts issues of well-being and quality of life (Forum for the Future and Hewlett Packard Labs, 2008). The arts may be well-placed to engage with and shape this debate and there are opportunities for artists to lead and influence society on environmental issues. However, this review found little evidence of the impact of such activity to date.

To conclude this chapter, the literature studied during the course of this review highlights a number of changes taking place in society and the economy, and the way people live their lives today. These changes present enormous opportunities for the arts but also reflect the complex challenges of being an artist and running an arts organisation today. These opportunities and challenges are particularly important when viewed in the context of arts policy and the way the arts funding and development system works in England, which is explored further in chapter three.

3 Arts funding and development

3.1 The purpose of arts funding

3.1.1 Debating value

A long-standing and much revisited theme in the literature is the question of how best to understand, articulate, assess and demonstrate the value of the arts and their funding (Webber and Challans, 1992; Jowell, 2004; Holden, 2004; Bunting, 2007). The discourse about the purpose and benefits of the arts can be traced back through human history, but the debate has perhaps become more heated in recent times as a result of an increased emphasis placed on public accountability and 'evidence-based policy making'. Since the 1980s central government has sought to drive improvements in public services both through greater transparency and public scrutiny of performance and by attempting to make decisions about the allocation of resources based on evidence of 'what works' in achieving a particular outcome.

The arts sector has responded by arguing an often successful case for the importance of the arts in contributing to wider social and economic policy goals such as community cohesion, reduced crime, improved educational attainment and job and wealth creation. Indeed there are many arts organisations and projects that are rooted in communities and specifically aim to promote social, economic or political change, and it may be appropriate and important to understand the role of such activities in the context of policy goals beyond culture.

However, many commentators have expressed concern about a perceived 'instrumentalisation' of the arts, noting that the evidence base to support claims of social and economic impact is not always sufficiently comprehensive or robust, and that these instrumental purposes generally do not fully reflect why the majority of artists and arts organisations think they are here in the first place (Holden, 2004). There has been a long-standing call to champion what is often referred to as the 'intrinsic' value of the arts, which is either presented as value that is created simply by the existence of artistic practice and works of art, or, more frequently, as a concept of value that is much more closely rooted in the direct experience of the arts in terms of expression, aspiration, identity and the development of the 'cultural life of the nation' (Jowell, 2004). In her 2004 essay Tessa Jowell, then Secretary of State for Culture, also suggested that this is a form of value that may never be amenable to measurement.

In the academic arena, the work of Belfiore and Bennett (2007) has been particularly influential in reframing questions about the impacts of the arts. Their analysis provides a powerful reminder that the instrumentalisation debate is 2,500 years old and includes a rich discourse concerning the negative impacts of the arts as well as the positive. They argue the need for a more sophisticated approach to understanding cultural value and its contested nature, and for more specific and detailed exploration of the mechanisms by which the arts might impact on

individuals and society more widely.

3.1.2 Excellence and access

Caught up in the debate about value is also the question of excellence, and how it should be prioritised and judged in the arts funding system. There is a strongly expressed argument in the literature that the principle of excellence must be central to arts funding, and an acknowledgement of the importance of peer review and other professional judgements of excellence (Tusa, 2007; McMaster, 2008). It has long been argued that excellence must be a non-negotiable criterion in decision-making if the full value of the arts is to be realised (Webber and Challans, 1992). However, just as prominent in the literature – if not more so – is the notion that excellence is a relative concept and is dependent on how an individual experiences and is affected by art, and whether it is something of meaning and relevance that helps people to make sense of their place in the world (McMaster, 2008). As such, it is argued that excellence can be found in any artform and in all types of practice and context, from ‘home-grown’ art by individuals and communities to work generated commercially to national publicly funded institutions, across both live and mediated forms of engagement (Joss, 2008). Similarly, concepts of excellence may vary geographically – different communities will have a different sense of what is meaningful and relevant to them, based on demographic make-up, artistic history and traditions and the opportunities currently available. It is also noted that excellence can refer not just to the artistic product itself, but also to the artistic process, the form of execution and distribution and the nature of audience engagement and experience (Hewitt, 2005; Bunting, 2007).

Innovation is seen as a core requirement for excellence in the arts (McMaster, 2008). If excellent art affects how people think about and experience the world, it needs to offer new perspectives and new ways of seeing and understanding. This in turn means developing new work, new ways of presenting and distributing and new forms of engagement. It is recognised that innovation, too, is contextual – what is fresh and distinctive varies from person to person, depending on background and experience (Bunting, 2007).

Given the subjective nature of concepts such as excellence and innovation, much of the literature is concerned with the relationship (and potential tensions) between excellence and access to and participation in the arts. While excellence may be an essential criterion for arts funding decisions, it is also argued that excellence demands and means nothing without engagement, and that public money must be focused on ensuring that everyone has the possibility to experience the best of the arts (Jowell, 2004). Holden (2008) takes this argument further, pointing out that the defence of excellence can also mean preserving barriers to access and reinforcing the status of elite groups. It is argued that public policy cannot impose definitions of ‘good’ and ‘bad’ art, and that audiences and the wider public need to be involved in the process of debating, judging and prioritising excellence alongside practitioners and experts (Leadbeater, 2005; Holden, 2008). However, some still question whether nurturing the best and most innovative work and widening access to the arts may be mutually exclusive goals, and that increased audiences can only happen at the expense of excellence (Cragg Ross Dawson, 2007; Ipsos MORI, 2010).

3.1.3 The need for shared purpose

Since it was first established the arts funding system has battled with these fundamental challenges – how to recognise and give weight to both ‘intrinsic’ and ‘instrumental’ outcomes and how to make decisions that marry a passion for excellence with a commitment to reaching as wide a public as possible. However, the literature reviewed for this study indicates that in recent times this battle has largely taken place at the level of advocacy and rhetoric, with insufficient attention being paid to establishing exactly what the arts funding system actually does or should achieve in practice. For example, the received wisdom is that over the last decade government has placed greater emphasis on instrumental outcomes. While there have been new, targeted initiatives in areas such as education, there is little evidence that any prioritisation of social or economic objectives has had any substantial impact on the decisions that have been made about mainstream arts funding, or indeed on how artists and arts organisations go about their work. Similarly, research has found disagreement in the arts sector as to what the priorities of arts

funding actually are. Some believe that funding is concentrated on 'elite' artforms and institutions, with lip service being paid to participatory and grassroots work. Others argue that there is too much emphasis on increasing reach, resulting in a weakened commitment to quality (Cragg Ross Dawson, 2007).

Overall, there is a fairly widely held view in the literature that to date the arts funding system has not been sufficiently clear about what it seeks to achieve with public money and that there is a lack of shared understanding as to what success looks like (Knell, 2004). This lack of shared purpose and success criteria is perceived to be causing the arts sector a number of difficulties. Firstly, there is an accountability challenge – it is difficult for funders such as the Arts Council and organisations themselves to demonstrate what they have achieved with their share of the public purse and to be held properly to account. This in turn presents an advocacy challenge, whereby the arts sector is limited in its ability to tell a consistently compelling public story about what it achieves and why the arts matter, and to make a convincing case for resources. Finally, and most importantly, as Baroness McIntosh concluded in her review of the Arts Council's 2007/08 investment strategy, there is a need for a transparent framework to underpin decision-making (Davey, 2008). Such a framework should ensure that arts funding is directed to those organisations and activities that are best placed and most likely to achieve clear and widely understood goals and that arts organisations can make informed choices about whether and how to engage with the public funding system. Some parts of the literature look to the field of economics for insights into how such a framework might be constructed.

3.1.4 The economist's perspective

The starting point for most economists is that in the context of public expenditure, decisions about the arts need to be made based on their effects on the rest of society. Governments and funders need to be able to choose effectively between alternative options for distributing finite resources, particularly at a time when public expenditure is under pressure. This means understanding the costs and benefits of different options, and the incremental value that is likely to be created by choosing one option over another (Bakhshi

et al, 2009). Economic frameworks for public funding of the arts have been proposed based on the identification of market failures – where individuals and companies do not deliver the most efficient or favourable outcomes for society. The central element of such frameworks is generally the need to address low demand for the arts due to individuals lacking the information necessary to fully understand and evaluate the pleasure and benefits that engagement with the arts might bring. Another element is often the generation of 'non-use' value, where the arts are valued for their prestige, their contribution to the identity of a country or place or the opportunities they offer for future generations, even by those who choose not to engage themselves. A further economic argument is the generation of positive externalities, whereby a benefit such as a more cohesive and creative community is experienced by more people than those who are directly involved with the creation and consumption of the arts (Frontier Economics, 2007).

Thus an approach based on economic theory does not necessarily mean investing public money in the arts in order to generate 'economic impact' as it is often understood in terms of job creation, productivity and the growth of the economy. Rather economists attempt to assess whether there is a rationale for government intervention in the arts, and if so, what the nature of that intervention should be. They typically conclude that there is a stronger rationale for supporting the demand for rather than the supply of the arts, and warn against the 'deadweight burden' generated by subsidising access to the arts for those who would engage anyway (Frontier Economics, 2007; Knell, 2007). Bakhshi et al (2009) argue that funding decisions would be improved by more comprehensive data on the preferences, attitudes and willingness-to-pay of members of the public including those who do and do not engage with the arts.

3.1.5 The public value approach

An alternative to more traditional economic approaches to understanding value is offered by public value, a relatively recent theory of public management. At the heart of public value theory is the notion that value needs to be negotiated, and that a public body creates public value by establishing its goals and priorities through dialogue and deliberation with all of

its stakeholders, including members of the public (Coats and Passmore, 2008). Public value acknowledges that on any given issue there will be a wide range of competing views held by different groups in society. Public value is a process by which these views can be uncovered, understood, debated and reconciled as far as possible. The idea is that through a public value process, a public body can establish a framework to underpin planning and decision-making that has public legitimacy because it is anchored by shared, negotiated values. This concept has had some appeal in the arts and wider cultural sectors where, it has been argued, current public debate is inadequate and there is a need to reconnect with citizens (Holden, 2006).

The Arts Council's public value inquiry in 2007 found that many people are passionate and articulate about what they see as being the value of the arts, whether or not they are engaged in the arts themselves. First and foremost, the arts are seen to enrich people's lives, bringing pleasure, relaxation, escape, solace, beauty and colour. The arts are also seen as part of a fundamental capacity for life, helping people to develop and express their identities, understand and communicate with others and interpret, adapt to and shape the world around them. Many people also recognise that this kind of rich artistic engagement can bring wider benefits to communities, promoting a sense of togetherness and cohesion, making places more attractive to live in and supporting learning and the development of skills, particularly among young people (Bunting, 2007).

The inquiry also uncovered powerful negative feelings towards the arts, particularly among those with least engagement and often associated with a sense of not being part of something that others enjoy. There are concerns about issues of elitism and exclusion across the population and as such there is broad support for public funding that enables as many people as possible to engage with the arts in ways that enrich their lives (Bunting, 2007).

This is by no means a demand for an arts funding system that responds in an unsophisticated way to general public opinion. Members of the public are highly concerned about judgements of excellence being made by the privileged few, but at the same time believe that public money should not

be spent on work that is 'easy', indistinctive or 'pure entertainment', and recognise that success needs to be judged by more than audience numbers. Similarly, members of the public are not agonised about the weight to be given to intrinsic versus instrumental outcomes – through deliberation, people come to the view that while high-quality artistic engagement may generate a range of wider social and economic benefits, these benefits should not be the primary focus of the arts funding system itself (Bunting, 2007).

3.1.6 A deeper public commitment

In recent years much expert commentary has also rejected the dichotomy between intrinsic and instrumental outcomes and between traditional notions of excellence and access (Hewitt, 2005; Joss, 2008). An emerging view that chimes with the public value findings is that the overall policy objective should be to enable everyone to develop rich, full creative lives, combining access to shared artistic heritage with enabling individuals and communities to create and express their own meanings and identities (Jones, 2009). Such a policy objective is seen to offer a solution to some of the complex philosophical dilemmas underpinning arts funding in that it places a responsibility on funders and funded organisations to discharge an important public mission, but in a way that is rooted in and remains true to artistic purpose and integrity (Kneill, 2006).

The literature indicates that a policy objective of this nature has a number of important implications for how arts funding works. First, it means developing a language to talk about success in terms of the impact of artistic engagement. If art enriches lives, then progress towards outcomes means understanding and evaluating the audience impact (Leadbeater, 2005), combining qualitative exploration with 'hard facts'. Second, it suggests a move away from the traditional notion of access as the removal of barriers and towards a more sophisticated concept of public engagement, based on two-way dialogue and empowering people with the skills and confidence to make their own decisions about the arts (Joss, 2008). Third, it reinforces the need to tackle the current and persistent inequalities in levels of arts engagement, and to reach out to less privileged parts of society. Fourth, it implies introducing people to 'high culture' while enabling them

to shape their own experiences (Knell, 2007). There needs to be a balance of both better communicating what the arts have to offer, inspiring enthusiasm for and engagement with the opportunities already available, and taking a bottom-up approach to develop new kinds of arts experiences that relate directly to people's lives today (Bunting et al, 2007). Finally, the arts funding system needs to promote and recognise its position within a broader narrative about the arts, one that links the contemporary with the past and connects the making, seeing, hearing and discussing of art, encompassing participation at home, online engagement, community activity and professional practice. As Joss (2008) points out, the arts are not defined by what is funded but by what people do, and as such they must evolve with society.

3.2 Balancing continuity and change

3.2.1 A decade of investment

In the 10 years from 1997 to 2007 there was a substantial increase in public expenditure on the arts, including a major investment in the capital infrastructure aided by the introduction of the National Lottery in 1994. Partly as a result of this investment, the arts in England today are generally viewed by the sector as a success story, regionally, nationally and internationally (Tusa, 2007). The arts can be seen as thriving in many ways with perceived growth in practice, practitioners and organisations, high levels of innovation, a major expansion of the capital infrastructure, increasing international activity, and a vibrant voluntary sector. In particular, the increased investment is seen to have helped to tackle some of the acute financial difficulties the sector was experiencing as a result of what was perceived as years of chronic under-funding.

Tackling financial problems has been a key focus of the Arts Council for at least the last decade. Part of the Arts Council's approach has been to tackle structural issues on a sector-by-sector basis, for example by attempting to establish a national pattern of provision in regional producing theatre and by removing the debt of regional orchestras in exchange for systematic organisational change, with a view to establishing a network of more sustainable providers. Alongside these

sector-specific developments, one of the largest investments the Arts Council made to tackle financial difficulties was through the Stabilisation and Recovery programmes. The Stabilisation programme aimed to enable arts organisations to change their artistic mission or business operation to achieve long-term sustainability, while the Recovery programme aimed to help organisations to develop recovery plans to deal with insolvency. Over £151 million was invested through the programmes in 96 organisations between 1996 and 2008 (PriceWaterhouseCoopers, 2008a).

Evidence suggests that a great deal has been achieved in addressing acute financial problems and modernising and stabilising larger arts organisations in particular. For example, between 1996/97 and 2003/04 the estimated proportion of organisations in the Arts Council's portfolio of regularly funded organisations with accumulated deficit fell from 41% to 22%, while the estimated proportion in surplus rose from 52% to 75% (Arts Council England, 2006a). The collective accumulated deficit of eight symphony orchestras of £9 million in 1999/00 was converted to a surplus of £0.8 million in 2003/04 (Arts Council England, 2006b). The financial health of visual arts organisations is also reported to have improved (Jackson and Jordan, 2006). An independent evaluation concluded that the Arts Council's Stabilisation programme, while expensive, tackled significant challenges and was a sensible and pragmatic approach to the problems of previous under-investment. The evaluation found that 87% of organisations that went through stabilisation are still in existence and that it is unlikely that this would have been the case without the Arts Council's intervention (PriceWaterhouseCoopers, 2008a).

3.2.2 Increased outputs, not impact?

Evidence also demonstrates an increase in productivity and artistic output since 1997. The Arts Council's Review of the Presentation of Contemporary Visual Arts in 2006 reported a steady increase in the level and quality of artistic activity (Jackson and Jordan, 2006), and the recent Theatre Assessment found that between 2001/02 and 2006/7 regularly funded theatres presented more work and employed more staff. Theatres also expanded the quantity and quality of their work for children and young people (Millman and Myers, 2009). Analysis of

data from the annual submission of a constant sample of the Arts Council's regularly funded theatres and symphony orchestras to 2003/04 identified increases in a number of outputs over the previous two to four-year period, including increases in commissions and performances, a major growth in education activity and an expanded workforce (Arts Council England, 2006b).

However, the evidence on whether the increased expenditure has resulted in changes in the size or diversity of audiences is less conclusive. For example, the Theatre Assessment found no pattern of increased attendance at regularly funded theatres since 2001, despite the increase in performances, and suggested that the same audience may be spread more thinly (Millman and Myers, 2009). There was a 3% fall in overall attendances at eight symphony orchestras between 1999/00 and 2003/04, but attendance trends are not the same across organisations and three of the eight symphony orchestras increased their attendances over the period (Arts Council England, 2006b). Attendances also fluctuate within the same organisation from year to year, and are highly dependent on the level and nature of programming in a given year. Furthermore, data currently collected from Arts Council-funded organisations relates to overall numbers of attendances, rather than the number and characteristics of unique attenders. As such, it is insufficient to measure comprehensively any change in the reach or audience profile of publicly funded arts organisations. More robust and consistent data collection mechanisms are required in order to assess whether the relatively recent increases in the productivity of arts organisations translate into new audiences in the longer term.

In addition to uncertainty about attendance levels, there is a view expressed in the literature that the arts sector remains over-stretched and under-capitalised (Mission Models Money, 2007), with organisations not funded to a level at which they are able to reach their full potential and, particularly in the visual arts, too many under-resourced small organisations (Jackson and Jordan, 2006). Many organisations that went

through the Stabilisation programme required additional revenue funding afterwards, and a third were still classified as 'high risk' in autumn 2007 (PriceWaterhouseCoopers, 2008a). There is evidence of the destabilising effects of large capital projects, which can lead to increased organisational ambition and costs but with insufficient ongoing revenue to meet these new demands resulting in greater vulnerability (Jackson and Jordan, 2006). It has been argued that the Arts Council has a tendency to withdraw at the point of completion of capital projects, without having fully understood or accounted for the ongoing revenue implications (PriceWaterhouseCoopers, 2008a). Overall, questions are asked about whether current funding practice actually perpetuates fragility in the sector, with arts organisations grappling with high fixed costs, inflexible business models and an over-reliance on public money (Mission Models Money, 2007).

3.2.3 A stable portfolio

Given the focus in recent years on stabilisation, it is perhaps unsurprising that there has been debate as to whether the portfolio of publicly funded arts organisations in England has become too fixed (Knell, 2004). Data on Arts Council expenditure on regularly funded organisations from 1996/97 to 2006/07 enables some analysis of the level of change in the portfolio. A core group of organisations received 93% of total regular funding in 1996/97 and 84% of the total in 2006/07. There were a large number of new additions, with 472 organisations entering the portfolio during this period; however, these organisations collectively received just 15% of total regular funding in 2006/07. The five 'national companies' receiving the largest grants from the Arts Council accounted for just under a third of total regular funding in 2006/07, although their proportional share reduced over the 10-year period. While the geographic spread of Arts Council regular funding became more equitable, in 2006/07 London still received the largest spend per capita by a large margin in 2006/07 (£22.08 compared with just £1.61 in the East where spend per capita was lowest¹) (Arts Council England, 2006a).

¹ Expenditure in London includes four of the five national companies funded by the Arts Council and, arguably, these organisations have a reach and impact well beyond London. When these companies are excluded from the analysis, spend per capita in London in 2006/07 was £11.10.

Stability may be a desirable and important quality in the Arts Council's practice of regular funding if the organisations that continue to be funded over the long term are those that are making the best possible contribution to enabling a wide range of people to experience arts that enrich their lives. However, commentators have questioned whether the overall arts funding system, the Arts Council and arts organisations themselves have been swift enough to respond to external drivers and enablers of change, particularly in relation to shifting consumer behaviour and expectations (Mission Models Money, 2007). Insufficient evidence of changes in audiences for the regularly funded portfolio has led some to suggest that current funding practice is encouraging a 'culture of accommodation to the status quo' (Knell, 2007), favouring 'premier league' institutions over emerging talent, large established organisations over the new and more experimental and attendance at live, formal events over more participatory and digital forms of engagement (Joss, 2008).

Overall, the literature provides a reminder that the constant challenge of arts funding is to strike the right balance of continuity and change, enabling long-standing organisations to evolve and new organisations to emerge and encouraging established organisations to reach new audiences while also shifting funding to communities where new audiences are forming (Leadbeater, 2005). A key aspect of this challenge relates to diversity – in promoting a flourishing, vibrant artistic ecology that fully reflects the ideas and experiences of society today, is it more effective to support the diversification of established organisations or to focus more funding on organisations that emerge from and are led by diverse communities? It may be that different degrees of stability and change are required in different parts of the arts sector and at different levels of the funding system. The literature suggests that the Arts Council can help to get the mix right in the ecology overall by becoming an increasingly strategic funder.

3.3 Strategic funding

3.3.1 Foster the health of the system as a whole

There is a useful body of literature, much of which draws on funding practice in the wider voluntary sector, which suggests a number of design principles for effective funding and development of the arts in the 21st century. First, it is argued that the Arts Council needs to do more to foster the health of the system as a whole. In part this is seen to mean focusing on outcomes before institutions, prioritising the achievement of wider goals that are valuable to society before the ongoing existence of specific arts organisations (Knell, 2004). Knell also notes that the goals and priorities of arts funding need to be developed collaboratively and widely shared and understood across the arts sector, with consensus on the relative weight to be given to different outputs. In line with the emerging notion of public value described in 3.1.5 and 3.1.6 above, public engagement and audience experience may need to be more central to the arts funding system, to ensure that publicly funded artists and arts organisations take their responsibilities to the public seriously and that over time the pattern of funding shifts as appropriate to reflect the changing nature and needs of society.

Another view expressed in the literature is that fostering the health of the system as a whole may mean a greater focus on individuals, talent and networks as well as the buildings and fixed assets of institutions. Curry and Gunn (2005) conducted an analysis of the Arts Council's funded portfolio. This revealed distinct types of funded organisations, from relatively established, building-based organisations with a traditional form of engagement with audiences to more free-floating organisations and networks with knowledge-based rather than fixed assets and more interactive and participatory forms of engagement with communities. While the majority of the Arts Council's funded portfolio is comprised of the former type of organisation, the research suggested that levels of innovation in the system overall could be promoted by more strategic investment in organisations on the experimental edge, and in individuals, who can have a disproportionately positive effect on the

health of the system by moving between organisations and sectors and building networks as they go. Numerous commentators have observed that the health of the system depends on the strength and durability of relationships between organisations and there are therefore calls for the Arts Council to focus less on individual organisations and more on the connections between them (Curry and Gunn 2005; Leadbeater, 2005).

3.3.2 Build financial capacity

There is now a considerable amount of literature on the role of funders in building the financial capacity of those they fund. In particular, it is argued that funders need to do more to promote the independence, resilience and sustainability of funded arts organisations (Mission Models Money, 2007). One study of sustainability in the museums, libraries and archives sector found that the sustainability of an organisation depends on a diverse mix of income streams and that overdependence on a single grant source can lead to 'goal displacement', where organisations are too ready to satisfy the major funder. The study argued that overdependence on a single source of funding can lead to a culture of risk aversion, reluctance to experiment with new business models and reduced levels of innovation overall, which is unsustainable in the long term. The research indicated that organisations with high levels of grant funding have lower perceived performance in relation to sustainability, and are more likely to feel that lack of autonomy to make decisions is a barrier (FreshMinds, 2008a).

In 2008/09 Arts Council funding made up 31% of the total income of its portfolio of regularly funded organisations. The largest source of revenue was earned income, including income from ticket sales and other commercial activity, which made up 47% of the total income of the portfolio. Local authority and other public funding made up 12%, while contributed income from business sponsorships, trusts and foundations and individual donors made up 9% (Arts Council England, 2009a). This breakdown has remained fairly constant over the years. In 1996/97 Arts Council funding made up 36% of the portfolio's income, with earned income at 46% (Arts Council England, 2006a). The level of reliance on the Arts Council as a major funder has therefore remained constant, but other sources of income

have kept up with the large increase in Arts Council investment since 1996/97. The level of reliance on Arts Council funding varies hugely across the portfolio. In 2003/04 around 10% of regularly funded organisations received at least 80% of their total income from the Arts Council, while around a fifth of organisations received less than 20% of total income from the Arts Council, and for a handful of organisations Arts Council funding constituted less than 5% of total income (Arts Council England, 2006a).

Evaluation of the Arts Council's Stabilisation and Recovery programmes concluded that the Arts Council should move away from 'rewarding failure' – increasing funding to organisations in financial difficulties – and do more to incentivise organisations to transform, rewarding innovation over survival (PriceWaterhouseCoopers, 2008a). The Arts Council's Thrive! programme was seen to represent a move in this direction by offering a systematic approach to developing organisational performance. The interim evaluation of Thrive! found that as well as financial support, the programme was providing a range of organisational development tools and guidance that are well-used and highly valued by participating organisations, many of which are on a major restructuring journey. The evaluation argues that there is a strong rationale for a programme like Thrive! but recognises that at this interim stage there is still a sustainability risk for most of the participating organisations, and limited efficiency gains have been observed so far (PriceWaterhouseCoopers, 2008b).

Beyond targeted programmes such as Thrive!, it is argued that public funders such as the Arts Council can help to build the financial capacity of the organisations they fund through good funding practice. For example, it has been observed that public funders need to take care not to limit risk-taking by penalising additional sources of income (Bolton and Carrington, 2007), and to encourage organisations to build up working capital, reserves and endowments (Mission Models Money, 2007). It is also widely accepted that funders need to ensure that grants cover the full costs of delivery (Knell, 2007). Furthermore, there is growing consideration of the role of funders in targeting support for projects that combine public benefit with commercial growth, which is seen as one of the ways in which the Arts Council can

help to stimulate the wider creative economy (Department for Culture, Media and Sport, 2008). Overall, the literature suggests that the challenge for the Arts Council is to find ways of funding that contribute to the goals it is seeking to achieve, that are congruent with the missions of funded organisations and responsive to their needs, and build the capacity of organisations to have and make choices about their own futures.

3.3.3 Flexible funding mechanisms

There is a growing and varied body of expert opinion on the range and effectiveness of funding and investment mechanisms available to public and private funders, and views on the appropriateness of different mechanisms for the Arts Council in particular. First, there are repeated calls within the arts sector for longer-term funding agreements, although these tend to be based on expert opinion and experience rather than empirical evidence of the benefits of long-term funding (Tusa, 2007; Knell, 2007; McMaster, 2008). Beyond the arts, Unwin (2004) has noted that it is unusual for any funders to commit themselves to an agreement for more than three years, and that this is one of the factors contributing to a lack of understanding of the trajectory of growth for funded organisations, with many in a constant cycle of renegotiating grant arrangements.

Knell (2007) suggests a number of potential benefits of long-term funding for the arts, including enabling better forward planning, increasing resilience and sustainability and creating a platform for greater innovation and risk-taking. A further potential benefit is that establishing a group of organisations to be funded over the long term would enable the Arts Council to be more transparent about maintaining the stability of those organisations. Knell also argues that funding should apply to fewer organisations but systematically and more generously. With such an approach could come greater expectations as to the public benefit those organisations create and the contribution they make to the health of the sector as a whole. At the same time, there are thought to be risks associated with long-term funding, including encouraging complacency and creating barriers to entry to the funded portfolio. One approach suggested in the literature is to combine an element of long-term funding with a forward-looking, strategic

programme that provides risk funding to a much wider range of individuals and organisations (PriceWaterhouseCoopers, 2008a).

There are calls for funders of artists and arts organisations to collectively diversify the range of available finance (Mission Models Money 2007), and in some instances to operate more as investors than funders, with some expectation of financial return. In addition to grants, suggested mechanisms for investing in the arts include seed-funding (for example, to artist-run groups to develop commercially viable ventures [Buck, 2004]); loans; venture capital to support innovation, particularly in emerging forms of personalised, highly interactive arts experiences; and quasi-equity, which provides a financial stake in a venture rather than shares in an organisation (Bolton and Carrington, 2007). It is argued that as well as promoting independence and sustainability, the provision of seed-funding places a positive emphasis on the development of a valid business case by artists and arts organisations, who are then able to test and develop their proposals before seeking significant implementation investment (PriceWaterhouseCoopers, 2008b).

Overall, the literature suggests that the Arts Council could complement long-term funding with a suite of mechanisms that enable effective investment in different parts of the sector, including individuals and small organisations and networks, and are tailored to achieving particular goals. It is also argued that through this suite of mechanisms the Arts Council should be open to funding a wider range of business models, including commercial ventures and organisations (Leadbeater, 2005). However, given the Arts Council's function to date has in the main been focused on grant-making, there is little empirical evidence on which types of alternative funding and investment mechanisms would be particularly suited to and appropriate for the Arts Council, which best meet the needs of different kinds of practitioner and organisation or which are most effective in achieving particular goals. This suggests that if the Arts Council is to develop new approaches to investment, it would be beneficial to do so through pilots in the first instance, evaluating carefully to test the effectiveness of different approaches before deciding which, if any, to roll out more widely.

Further, it is noted that if arts organisations are to make the most of the opportunities available to diversify their income streams, they need a certain level of expertise and knowledge. A number of studies suggest that as well as offering appropriate forms of finance themselves, funders may have a role to play in addressing the perceived lack of financial management skills in the arts sector and raising awareness of the availability, strengths and weaknesses of alternative financial instruments. Suggested forms of support include advice on which types of activities can be run effectively and which are profitable; training in areas such as asset measurement and commercial awareness; access to experts and peer-to-peer support; and signposts to other sources of advice in the wider voluntary and not-for-profit sectors (Bolton and Carrington, 2007; FreshMinds, 2008a).

3.3.4 Clearer terms of agreement

Finally, there are a range of views relating to the nature of the relationship between the Arts Council and funded organisations, and in particular whether the terms of agreement underpinning the relationship need to be clearer. There is some debate as to whether the Arts Council should apply fixed, objective criteria when making funding decisions or rely more on its own expert judgement (Cragg Ross Dawson, 2007). However, the balance of opinion appears to be that funding practice is more effective when the criteria are clear and widely agreed and there is a sufficiently contractual relationship between funder and funded organisation to ensure legitimate decisions (Webber and Challans, 1992). Knell (2006) argues that funding agreements should express agreed minimum levels of performance by funded organisations, particularly in relation to key areas such as reach and audience engagement. Again, this approach would place the Arts Council more in the role of investor than funder, with a clear expectation of return (although that return may not be financial). Importantly, there is general agreement that a funding relationship should be seen as a partnership for mutual benefit, with the funded organisation also clear about what it stands to gain, which again may be more than financial input.

While there are calls for the terms of agreement to be clearer, there is also a somewhat conflicting desire for less bureaucracy in the system, with funding agreements based more on openness and trust (Davey, 2008). Suggested solutions include ensuring monitoring is proportional to the size of investment and developing different types of funding agreement for different types of relationship: light-touch funding for organisations that are funded over the long term and have a track record of strong performance; and highly tailored agreements with more tightly defined outcomes for time-limited arrangements (Knell, 2007).

When it comes to generating data to assess performance, it is argued that arts organisations need both quantitative and qualitative measures that incorporate both peer review and audience impact, allowing for an effective evaluation of reach and audience experience and engagement (Johnson et al, 2004; Leadbeater, 2005; Holden, 2008).

3.4 A leadership role

As some of the literature included in the review was commissioned by the Arts Council itself, it provides a number of suggestions about the leadership role the Arts Council might play in the sector above and beyond fulfilling its responsibilities as a strategic funder. It is seen as important for the Arts Council to set a strategic vision and direction and to be clear about its role, priorities and the policy imperatives behind individual initiatives (Jackson and Jordan, 2006; Bunting, 2007). The Arts Council is not seen to have always achieved this level of clarity in the past; it is recognised that with a large and diverse number of stakeholders the Arts Council cannot satisfy every expectation and should focus on presenting and defending a clear and consistent philosophy across the board (Cragg Ross Dawson, 2007). A shared national philosophy should allow for regional distinctiveness, and the Arts Council is seen to need a strong strategic framework that guides all of its activities but enables local innovation and diversity to flourish (Peter Boyden Associates, 2001; Ipsos MORI, 2010). It is argued that to respond to a changing world

the Arts Council may need to become more entrepreneurial and imaginative, with a greater appetite and capacity for risk (Leadbeater, 2005; Jackson and Jordan, 2006).

Partnership is seen as critical, with the Arts Council having an important advocacy and brokering role across central and local government in particular (Tusa, 2007). The Arts Council can play an effective leadership role when it brings together a range of partners to develop shared objectives in relation to a particular issue and a collective approach to delivery. It may be that the Arts Council does not always need to be 'at the table' when a new partnership initiative is being developed but can usefully broker connections to ensure the right people are talking to each other. Funders in general are encouraged to help organisations to work together to solve problems for themselves (Mission Models Money, 2007). Recent research for the Arts Council by Ipsos MORI (2010) shows that partnership is seen as particularly important in a time of limited public expenditure, suggesting that the Arts Council will need to be sharply focused in assessing how it can further its goals and the goals of others by supporting and building the capacity of partner organisations, rather than undertaking new initiatives itself. The study demonstrated that the Arts Council is already perceived as an effective, supportive partner that helps other organisations to achieve their goals: 87% of stakeholders believe they have a good or very good working relationship with the Arts Council.

However, stakeholders are less likely to see the Arts Council as an open, transparent organisation and there is a strong and repeated call for the Arts Council to be clearer about how it makes its decisions and to involve its stakeholders more in the decision-making process (Davey, 2008; Ipsos MORI, 2010). The Arts Council is encouraged to build shared ownership of the process of setting priorities and making decisions with its stakeholders. Initiatives such as Sustained Theatre provide possible models of collaborative decision-making that could be built more into the mainstream of the organisation (Bryan, 2007). There is considerable debate about the extent to which the Arts Council should interact more directly with the public, with concerns that greater public involvement will lead to 'safe' decision-making and be difficult to implement in practice

(Bunting, 2007). However, given the notion of public value described in sections 3.1.5 and 3.1.6 above, it is seen as important for the Arts Council to find meaningful and imaginative ways to listen to the public on an ongoing basis, to ensure its priorities remain relevant to and valued by society and to tap into local knowledge and ideas (Hewitt, 2005; Bunting, 2007; Holden, 2008).

Finally, there are a number of views in the literature relating to the Arts Council's leadership role in providing robust intelligence for and about the sector, improving the collection and use of evidence, and in holding itself to account and learning from previous experience. These views are considered in more detail in chapter five.

3.5 Responsive (and responsible) arts organisations

The literature makes a number of recommendations as to how arts organisations, as well as the Arts Council, need to adapt to the changing environment. Critically, arts organisations that fail to respond to new patterns of consumer behaviour and expectations will be left behind. It is argued that in the context of public funding and the notion of public value described above, arts organisations need to place public engagement at the heart of what they do, combining artistic excellence and integrity with a greater audience focus (Knell, 2006). By prioritising audiences and the wider public alongside artistic vision, arts leaders can ensure their organisations remain relevant and responsive to audiences (essential if they wish to operate as successful businesses) and are positioned as key partners for public sector funders. It is also argued that publicly funded arts organisations need to care more about accountability and demonstrable outcomes (Joss, 2008), and to be able to tell a clearer story about their value as negotiated with audiences, peers and funders (Leadbeater, 2005).

Research has found that arts organisations are generally highly innovative in their artistic programming but that this is rarely matched by an appetite for organisational renewal (PriceWaterhouseCoopers, 2008a). The interim evaluation of the Arts Council's Thrive! programme found that sustainability depends on organisations being prepared to take a

much more entrepreneurial approach to their activities (PriceWaterhouseCoopers, 2008b). Leadbeater (2005) calls for arts organisations to better combine artistic purpose with commercial strategy, understanding and exploiting their assets and driving greater levels of innovation. Arts organisations are encouraged to experiment with new business models and organisational forms, with the dominant charity model being seen by some as excessively risk-averse (Mission Models Money, 2007). Key to organisational growth will be the development of new models that enable an organisation to increase its impact without increasing its fixed costs. As noted above, arts organisations need a diversity of income streams, as well as a build-up of reserves, linked by a strong core mission and coherent strategy that collectively allow for longer-term planning (FreshMinds, 2008a). Successfully joining up and managing all of these elements presents a major leadership challenge.

As well as developing new business models and diversifying income streams, arts organisations are encouraged to experiment with new working practices that enhance performance, create efficiencies and free up resources to reinvest in the creative process and product (Leadbeater, 2005). There is a considerable amount of literature now on the need for effective governance in the arts and the wider voluntary sector. There are also calls for arts organisations to invest in research and development and new technology and systems, to generate administrative efficiencies and to ensure the vitality and relevance of their practice over the long term (Arts Magnet, 2006).

Arts organisations also need to consider how to reduce their environmental impact. Research in the music industry indicates that audience travel is a key contributor to environmental impact in the arts and notes how challenging it will be to cut emissions without having a negative impact on business models (University of Oxford Environmental Change Institute, 2007). Digital technologies have the potential to engage audiences in a less carbon-intensive way, and climate change is seen as an important driver of innovation in organisational models, practice and content (Forum for the Future and Hewlett Packard Labs, 2008).

Finally, there are repeated calls in the literature for arts organisations to help each other to address these challenges through greater collaboration, and these calls are made across artforms from visual arts to dance to opera to carnival to disability-related companies. Research has indicated that arts organisations that thrive in the 21st century are those that can build relationships with other organisations with contrasting strengths and characteristics (Curry and Gunn, 2005). While many young organisations are 'instinctively networked', established organisations need to be better connected and there is a call for more relationships between large and small organisations and for better mutual support (Knell, 2004; Curry and Gunn, 2005). It is argued that arts organisations can make savings and promote sustainability by pooling resources, sharing learning and through more formal forms of collaboration such as mergers, back office consolidation and joint ventures (Mission Models Money, 2007). There is also scope for the sector to address the challenges of climate change collaboratively.

To conclude, the literature implies there is a real opportunity for arts organisations and the Arts Council to take greater responsibility for the health of the sector overall. While experts have observed an appetite for change in the sector, and the emergence of new structures and alliances, it is argued that the pace of change needs to quicken (Mission Models Money, 2007). The Arts Council's proposal for long-term goals for the arts in England may provide a framework within which the sector can work collaboratively and with shared purpose to ensure its long-term health and vibrancy.

4 The Arts Council's goals

The literature review was undertaken primarily to support the Arts Council in prioritising and selecting long-term goals to guide its future activities. As such, it does not provide a comprehensive account of the available evidence relating to each of the five goals that were eventually selected and proposed in the formal consultation paper. However, the literature provided some useful insights which helped to shape the goals. This chapter summarises this information by providing a brief account under each goal of the challenges to be addressed, any lessons to be learned from previous experience, possible future directions and any identified gaps in the evidence base.

4.1 Talent and artistic excellence are thriving and celebrated

The starting point for this goal is that artistic excellence does not just happen – there needs to be a concerted effort to nurture talent from the early years through education and training and continuing professional development (Department for Culture, Media and Sport, 2008a). The literature considers the complex demands of being an artist today. For example, dancers are required to combine physical athleticism with a language to articulate what they do and communicate it to others as well as finely honed business and strategic skills (Burns and Harrison, 2009).

Jeffreys (2004) finds that artists are more likely than average to work under short and temporary contracts, hold second or multiple jobs, have less job security and to be unemployed. Critically, artists cannot or do not generally reflect research and development time in the end price of a work which may be undervalued as a result. Jeffreys also notes that discontinuous employment and variable earnings make the tax situation for artists complex and create difficulties in funding pensions and mortgages. European research finds that social security programmes structured according to classic employment models tend to penalise artists; there are a number of interesting international examples of economic protection for artists such as the Status of the Artist Act in Canada (European Institute for Comparative Cultural Research, 2006).

McMaster (2008) reiterates a long-standing argument that artists have insufficient time, space and freedom for expression and research and need opportunities to develop, make new work and create the conditions for growth. In sectors such as dance there is found to be need for better-resourced small-scale incubation of ideas (Burns and Harrison, 2009). Artists need different types of support at different stages of their careers, and the extent of portfolio working can make it difficult to access training and professional development. Mentoring and networks for artists are found to be highly valued (Jeffreys, 2004).

The review incorporated a number of studies relating to creative workspaces. Research has found a huge variety in types of workspaces available to artists in England, with a range of providers including higher education institutions, local authorities, artists' cooperatives and the private sector. The clustering of workspaces is found to be particularly beneficial, offering opportunities for artists and creative businesses across sectors to share resources, network and exchange ideas (Burns Collett and DCA, 2008; Inglis Todd Consultancy, 2008). However, it is likely that there is unmet demand for creative workspaces, especially in London and the South East, and financing can be problematic. Direct public subsidy is not seen to be the best solution as it is unsustainable in the long term and may mitigate against flexibility and innovation. Rather practitioners are found to value business support and market development over subsidised workspace (Burns Collett, 2006).

The mobility of artists is seen as crucial to the pursuit of excellence (Polacek, 2007), particularly young practitioners having the opportunity to see work abroad (McMaster, 2008). Organisations including the Arts Council and particularly the British Council have made efforts to develop models to promote the international exchange of ideas and practice. However, changing immigration rules present a risk to greater internationalism and there is a call for more information and training on issues such as visas and work permits at a European level (Polacek, 2007).

The literature suggests a number of directions to pursue in nurturing artistic talent in the future. First, it is proposed that efforts be made to develop a more comprehensive 'talent pathway' scheme, joining up existing initiatives such as Find Your Talent (see section 4.4) with careers advice and apprenticeships with a view to providing an 'end-to-end' offer for creative practitioners (Department for Culture, Media and Sport, 2008a). Studies have reported arts organisations to be an essential part of the network and argue that arts organisations should be encouraged to create environments that support artists and creative producers (Shaw et al, 2006). The Arts Council's Escalator scheme in the East region provides a possible model for opening up professional development opportunities for artists

and art organisations, and there are useful case studies of the role of mixed artform venues in supporting and showcasing talent and providing incubation and start-up space (Tom Fleming Creative Consultancy, 2009). Research points to the need for a concentrated programme of support for artists, covering networks, skills, professional development and international exchange (Jeffreys, 2004). Finally, the literature suggests that partnerships beyond the arts sector are important: with local authorities, regional development agencies and planners to broker the development of creative workspaces; with higher education to build on opportunities for artistic research and development and knowledge transfer; and with broadcasters to develop a comprehensive approach to talent development across platforms and media.

Despite these useful pointers, the literature covered in this review was a long way from providing a comprehensive, empirical account of how best to systematically nurture artistic talent and the relative strengths and weaknesses of different approaches to date. It may be that greater insight could be found by undertaking a deeper review of work on talent undertaken by academics or in other sectors. If not, this is a priority area for further, large-scale research.

4.2 The arts leadership and workforce are diverse and highly skilled

As noted previously, there is widespread acknowledgement across the literature of the importance of diversity in the arts. Diversity is seen as a fundamental criterion for excellence and innovation to flourish (Webber and Challans, 1992; Hewitt, 2005; McMaster, 2008). Diversity is central to the notion of public value described in sections 3.1.5 and 3.1.6 – art that reflects a wide range of traditions, experiences and ideas is felt to open people's eyes to the situations of others and encourage them to think about the world in new ways (Creative Research, 2007). It is argued that more diverse practice and practitioners will appeal to and resonate with diverse communities, enabling the arts to engage a wider audience. Diversity is also seen as a means by which the arts progress, with a multiplicity of perspectives helping to generate new ideas and new forms of

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practice. It is also argued that a diverse workforce is important for competitive advantage, creating a larger pool of resources to meet increasingly diverse skill requirements and fostering international connections (The Change Institute, 2008).

Despite the importance of diversity, the arts workforce – like arts audiences – is dominated by white, educated, middle-class women, with a skew to London and the South East (Institute of International Visual Arts and Arts Council England, 2008; Jackson and Jordan, 2006; Burns and Harrison, 2009). Jeffreys (2004) observes that the predominance of volunteering in the arts tends to exclude those without the means to support themselves. Commentators have pointed to an urgent need to diversify right across artforms (Leadbeater, 2005; Joss, 2008). There are profound challenges to be tackled: finding the right balance between supporting the 'establishment' to diversify and nurturing clusters of newer, more diverse organisations to sustain themselves; building up the supply of diverse artists as well as audiences for their work; celebrating the distinctiveness of individual cultural traditions while building bridges between communities; ensuring the process of diversification is led by art rather than by legislation; and managing complex issues around language and definitions.

The Arts Council has worked to tackle these issues and respond to growing public sector equality duties over a number of years, particularly through its Race, Disability and Gender Equality Schemes and initiatives such as the Black Regional Initiative in Theatre, Decibel and Sustained Theatre and targeted fellowships, awards and curator programmes in the visual arts. The Race Equality Scheme in particular has been noted as important in establishing strategic direction and ensuring a persistent, consistent approach (The Change Institute, 2008). There has been some progress over the last decade. For example, in 1996/97 the estimated proportion of the permanent workforce of Arts Council regularly funded organisations from black and minority ethnic groups was 6%; by 2008/09 this had risen to 11%. In 2008/09 13% of the working-age population in England was from an ethnic minority. The proportion of board members of funded organisations from black and minority ethnic groups increased

from 8% in 1996/97 to 15% in 2008/09. The proportion of permanent disabled staff employed by regularly funded organisations also rose but from a low starting point: there was an increase from 1% to 2% over the same period. The proportion of disabled board members has remained constant at 4% (Arts Council England, 2006a; Arts Council England, 2009a). The Arts Council's recent Theatre Assessment found steady levels of staff from black and minority ethnic groups in regularly funded theatres between 2001/02 and 2006/07, but an increase in disabled staff (Millman and Myers, 2009). The Arts Council's Dance Mapping exercise concluded that there has been a high investment in black artists and practice, but insufficient capacity building to maximise that investment. The report also found that work by and about disabled people in dance has an increasingly high profile, but concludes that work needs to start more from its own language base rather than being originated by non-disabled dance-makers (Burns and Harrison, 2009).

Overall, it is acknowledged that there is still much work to do and a need for an approach based on wholesale culture change as well as monitoring and recruitment strategies (The Change Institute, 2008). There is thought to be a continued need for a proactive approach to identifying talent and ensuring the progression and transferability of practitioners from diverse backgrounds. Again, partnership is seen to be crucial, particularly with the higher education sector where participation in art and design is reported to be insufficiently diverse (Jackson and Jordan, 2006). Research has identified the need for well-constructed, sector-specific, multi-tier mentoring programmes to engage diverse groups of young people with careers in the arts (Institute of International Visual Arts and Arts Council England, 2008). There may also be further scope to connect the arts to mainstream initiatives around workforce diversity, with bodies such as Creative and Cultural Skills playing a lead role in addressing the diversity of the workforce of the creative industries more widely, and diplomas and apprenticeships increasingly being deployed as a route to diversification. There are calls for a sector-wide, long-term strategy for the collection and collation of appropriate data on diversity, and for greater sharing of best practice (The Change Institute, 2008).

While diversity is a central element of the workforce literature, there is also fairly extensive material covering the themes of skills and professional development. Skills development has been seen as a particular issue in the arts sector where work is typically project-based and networked, with limited career progression, low pay, poor benefits and little formal professional development (Jackson and Jordan, 2006). The arts workforce is reported to be characterised by young staff with a high turnover (Leadbeater, 2005) and, in the visual arts at least, a high likelihood of people leaving the sector mid-career (Arts Council England, 2006c). There is a prominent public policy context for skills development in the workforce as a whole, suggesting that the key issue is to connect the arts up with this wider agenda through agencies such as Creative and Cultural Skills. Another opportunity for the arts is presented by the current focus on diplomas and apprenticeships to strengthen the workforce as a whole, and there is an ambition to create up to 5,000 apprenticeships across the creative industries by 2013 (Department for Culture, Media and Sport, 2008a).

It is argued that arts organisations need to be encouraged and supported to prioritise professional development (Mission Models Money, 2007; McMaster, 2008). There is scope for arts organisations to engage with mainstream training opportunities, forge collaborations to share HR solutions across the sector and create innovative places of learning connected to schools and higher education. There is debate in the literature about the extent to which current higher education and vocational training provides the skills necessary to enable graduates to flourish in the arts and wider creative industries, and indeed whether there is an over-supply of arts graduates relative to the current demand for labour in the sector. However, recent empirical research has found that the majority of art and design graduates are satisfied with their experience of higher education and are content with the career it has enabled them to pursue. The study found that 75% of art, design, craft and media graduates from 2002–04 have worked in the creative industries since graduating, many working freelance or in a micro-business and juggling multiple activities (Institute for Employment Studies, 2009).

Finally, the review covered some of what is now a fairly wide body of literature on leadership in the arts and the cultural sector more widely. The Cultural Leadership Programme was launched in 2006 on the premise that 'strong and innovative leadership will be critical in ensuring a strengthened, sustainable sector' (Devlin et al, 2008). The initiative is a partnership between the Arts Council, the Museums, Libraries and Archives Council and Creative and Cultural Skills, and was conceived to respond to a number of perceived problems relating to leadership in the cultural sector. Compared with other public and private organisations, cultural organisations are reported to invest a relatively low proportion of their turnover in professional development. In addition, cultural organisations are generally small in size and it is argued that practitioners can find themselves in senior positions at relatively early stages of their careers and experience isolation as leaders (Cultural Leadership Programme, 2008). There are perceived to be important skills gaps at senior levels in the cultural sector (particularly in relation to financial management, business models, technology and governance) that are limiting the sector's ability to respond effectively to a changing environment (Mission Models Money, 2007; Cultural Leadership Programme, 2008). Critically, as with the workforce as a whole, there is evidence that black and minority ethnic leaders are under-represented in the sector (The Change Institute, 2008).

A recent strategic evaluation estimated that the Cultural Leadership Programme delivered 31,700 training days during its first two years of operation and engaged 14,000 people in total (Cultural Leadership Programme, 2008). The evaluation argued that the Cultural Leadership Programme has taken a highly networked, grass-roots approach to leadership development, enabling participants to build on existing good practice and offering a potential model for wider learning initiatives in the sector. The evaluation notes the need for new and more cost-effective models of engagement, particularly online resources and networked-based models such as action learning and peer mentoring. It also recommends greater engagement with cultural sector employers as well as workers and the further development of training and development partnerships with private sector organisations. Overall, however, the evaluation concluded that

it was too early to assess whether leadership performance in the sector will improve as a direct result of the programme; the Arts Council and partners will need to continue to give careful consideration as to how best to develop new generations of creative leaders.

4.3 More people value and enjoy the arts

The evidence on arts audiences and cultural participation more generally is now highly developed, with a large quantity of data and high-quality, imaginative research generating insights into how and why people in England engage in the arts today.

4.3.1 Patterns of engagement

The primary source of data on arts engagement in England is Taking Part, an ongoing national survey of cultural participation run by the Department for Culture, Media and Sport in partnership with the Arts Council, English Heritage, the Museums, Libraries and Archives Council and Sport England. The Taking Part survey shows that in 2008/09 76% of English adults had engaged in the arts at least once in the last 12 months. The Taking Part survey distinguishes between attendance at arts events such as going to the theatre or an art exhibition and participating in arts activities such as painting or playing a musical instrument. In 2008/09 67% of English adults had attended at least one arts event and 45% had participated in at least one arts activity in the previous 12 months. Taking Part also provides data on frequency of engagement, and finds that the majority of arts attenders go to arts events just once or twice a year, while the majority of arts participants practise their arts hobbies on a much more regular basis, typically once a week (Martin et al, 2010). As Taking Part is an ongoing survey, it has also started to enable the tracking of trends over time. In the first three years of the Taking Part survey from 2005/06 to 2007/08 there was no significant change in overall levels of arts engagement. One of the few exceptions to the national pattern was a significant increase in engagement in the North West in 2007/08, which may be attributable in part to Liverpool's year as European Capital of Culture in 2008. This suggests that it is possible to make an impact on

levels of engagement through a concentrated, collaborative, city-wide approach (Oskala and Bunting, 2009).

Taking Part provides data on levels of attendance at individual arts events, enabling more detailed understanding of the nature of arts engagement in England today. In 2008/09 the most popular form of arts attendance was going to a live music event (not classical or jazz); 27% of English adults had been to a live music event in the previous 12 months. The attendance rates for plays and art exhibitions were 21% and 18% respectively. More open and accessible (but perhaps less established) arts events have slightly lower attendance rates – in 2008/09 12% of adults had attended a carnival and 12% reported attending a public art display. Opera and contemporary dance are relatively niche activities with attendance rates of 4% and 3% respectively (Martin et al, 2010). When data on attendance at different types of event is combined with data on frequency of engagement, it is clear that a small proportion of the population engages with more established artforms on a very regular basis. In fact in-depth modelling of Taking Part attendance data from 2005/06 found that just 4% of the population could be classified as 'voracious' arts attenders, regularly attending across a broad range of events. However, a further 13% were classified as 'enthusiastic', with fairly regular attendance at a preferred artform such as music or theatre. Over a quarter of the population were classified as attending 'now and then', with attendance something of a special occasion at one or two types of arts event once or twice a year (Bunting et al, 2008).

The same research also revealed inequalities in levels of arts attendance across different groups in the population. When all other factors are held constant, women are more likely to be active arts attenders than men, older people attend more than younger people, attendance rates are higher among white than black or Asian groups. Having poor health and being parents with young children are also factors that limit active arts attendance. However, the most powerful factors in predicting levels of arts attendance are consistently found to be education and social class. In particular, those who have been educated to degree level are much more likely to attend the arts than those with fewer

educational qualifications, even when factors such as age, income and ethnicity are taken into account (Bunting et al, 2008). Inequalities in arts engagement mirror inequalities in many other aspects of public life, from employment to voting, and, while robust data on cultural participation has only been available in recent years, are thought to go back decades if not centuries.

While the research demonstrated clear socio-economic differences in patterns of arts engagement, it found no evidence of a 'cultural elite', where privileged groups confine themselves to forms of 'higher' culture only. Rather, those who are active tend to be active across a wide range of events, from more popular forms such as cinema through to more niche activities such as ballet (Bunting et al, 2008). In fact detailed analysis of engagement patterns by artform reveals some important variations in the types of people who attend different events. For example, non-white groups are more likely to attend cultural festivals and carnival appears to be the most democratic form of arts event, with equal levels of attendance across education, class and income groups (Chan et al, 2008c). There are socio-economic variations in levels of arts participation, but these tend to be less marked than for arts attendance.

4.3.2 Attitudes, motivations and barriers

There is now a considerable amount of largely qualitative research that provides insight into why people are motivated to engage with the arts and what puts people off. Overwhelmingly, people are found to engage with the arts first and foremost for pleasure and enjoyment – a chance to relax and escape from the realities of daily life. Socialising is a key element of arts engagement, with the chance to spend time with friends and family and build social networks a key motivator. People are also found to be motivated by a desire to express themselves and communicate with and understand others through the arts (Creative Research, 2007; FreshMinds, 2008b). Differences in levels of arts engagement along socio-economic lines suggest that the concept of identity is important in shaping arts engagement. This may partly be about confirming and reinforcing identity – people engaging in a lifestyle that they think is appropriate to their social status (Bunting et al, 2008). It may also be about identity-construction – people actively

shaping a sense of self through choices about arts engagement. For example, research has found that disabled people who engage with the arts are partly motivated by a desire to feel a 'full member of society' and to express themselves in response to feelings of 'invisibility'; they are motivated to engage with arts that represent a broad and authentic picture of disability. Similarly, research notes the importance of culturally relevant content particularly in appealing to black and minority ethnic groups, who are found to express a distaste for tokenism and a desire to engage with an authentic reflection of their experiences and beliefs (FreshMinds, 2008b).

When it comes to barriers, there is little evidence that people experience a lack of opportunity to engage – the arts are seen to be 'there if you want them'. While lack of time and cost are frequently cited barriers, more in-depth qualitative research finds that psychological barriers are more important overall than practical concerns. The Arts Council's public value inquiry found that the dominant and paradoxical issue is risk – the unknown quantity of an arts experience is part of the appeal, but is also off-putting. Fundamentally, people are concerned that they won't enjoy the experience and that it won't be 'worth it' in terms of the investment of time, money and emotion required. Caught up with this are questions of intellectual nervousness and lack of cultural self-confidence – people are worried that they won't understand what they've experienced or know how to respond. Issues relating to identity are barriers as much as motivation. Many people report feeling that the arts are 'not for people like me' and are concerned about not fitting in or being looked down on in some way. While these concerns are felt more strongly among those with least engagement with the arts, particularly those from lower socio-economic groups, even those who are already engaged can feel nervousness about trying something new in the arts (Creative Research, 2007).

Joss (2008) observes that the focus on barriers tends to imply that problems with levels of arts engagement stem from the characteristics and attitudes of people themselves, and not the way in which the arts are created, distributed and communicated. The fact that not everyone is highly engaged even among well-educated, high-status groups suggests that some people

are making active choices not to engage even though they are likely to be equipped with all the necessary information and tools (Bunting et al, 2008). Recent research has therefore sought to understand the role of the arts in relation to people's lives more widely, and the extent to which the arts connect with broader aspirations and experiences. The Arts Council's audience segmentation project analysed both arts attendance and participation behaviour, demographics and attitudes to identify 13 distinct types of arts engager in England, from the 'urban arts eclectic' to 'bedroom DJs' to 'a quiet pint with the match' (Arts Council England, 2008). The research concluded that a large proportion of English adults are currently moderately engaged with the arts, but their lifestyle choices and broader hopes and expectations suggest a degree of untapped demand for greater engagement and more creative, enriching experiences. However, this relies on the nature of arts opportunities, the way they are communicated and the forms of engagement they offer to be better tailored to respond to the ideas and aspirations of different groups.

4.3.3 Campaigning

Campaigning may be one of the key ways in which public bodies like the Arts Council can work to increase engagement with the arts. Research suggests that campaigns need to tell a different, more inclusive story about the arts – one that responds to the key motivations of enjoyment, relaxation and socialising (Bunting et al, 2007). Research has found that people are likely to be resistant to campaigns that are perceived to be making judgements about what people should or shouldn't engage in. The focus should be on making people aware of the choices available to them, building self-confidence, offering reassurance that people won't feel uncomfortable or excluded and providing information about the practicalities of engaging in a way that empowers people to make their own judgements (Creative Research, 2009).

Evaluation of the Arts Council's £20 million New Audiences programme reported that the programme attracted over 4 million attendances from 1998 to 2002, with a focus on engaging diverse and excluded communities. The evaluation found a number of approaches to be effective in engaging new audiences including broadcast

projects, ambassador and network marketing, providing opportunities to 'test drive' the arts and collaboration with mainstream retailers (Johnson et al, 2004). A number of models were developed over this period that could be rolled out more widely in the future.

4.3.4 New forms of engagement

As well as promoting more effectively the arts that are already on offer, much of the research points to the need for new kinds of arts experiences that are more democratic and 'status-neutral' and that connect more closely with people's day-to-day lives (Bunting et al, 2007, 2008). There are calls to turn the arts 'inside-out' (FreshMinds, 2008b), taking them out of established venues in metropolitan centres and into new places at new times, making imaginative use of public spaces. This might mean investing in large-scale events of national significance and a focus on outdoor arts and festivals as a means of introducing people to the new and unfamiliar in a participatory, inclusive way. It is argued that funding needs to be focused on the innovators – those at the cutting edge of creating and producing highly interactive arts experiences – as well as on enabling established, building-based organisations to take work to new people in new ways (Knell, 2006).

4.3.5 The geographical dimension

The literature indicates that place is an important factor both in determining levels of arts engagement and in developing interventions designed to increase engagement. Local-level data indicates large discrepancies in levels of engagement across the country, from the borough of Camden in London, where arts engagement is estimated at 67% of residents, to Newham, also in London, where the engagement rate is just 29% (Brownlee and Ellitts, 2008). A large amount of this variation can be explained by the socio-economic characteristics of different areas. However, research has found that Londoners overall are more likely to engage than people in any other part of the country when socio-economic differences are taken into account (Bunting et al, 2008), and levels of engagement in Liverpool and the surrounding area were recently found to be higher than expected given the socio-economic characteristics of the region (Brownlee and Ellitts, 2008). This suggests that a critical mass of investment and activity can impact on levels of

arts engagement in a locality and that a spatial approach to intervention may be important, including targeting 'cold spots'.

A spatial approach requires arts organisations, the Arts Council, other cultural agencies, local authorities and the voluntary sector to work together to understand a community's needs and identify the providers that are best placed to meet those needs. The direct involvement of local people is seen as important, with studies suggesting that techniques such as participatory budgeting have the potential to improve decision-making and relationships between artists, arts organisations and communities, and to foster greater public ownership of the arts (Fennell et al, 2009).

4.3.5 Touring and collections

To date touring has been one of the main ways in which the Arts Council has sought to distribute opportunities geographically, with large-scale lyric touring providing a structure for distributing some of the most expensive Arts Council-funded work and cross-border touring offering opportunities for large-scale companies to tour outside their home country within the UK. Rural touring has been found to be an effective way of engaging audiences not normally found at mainstream events and venues, with research concluding that a third of attendees at rural touring events did not engage in other kinds of arts event (Matarasso, 2004). However, the Arts Council is perceived to lack a national overview of touring and audiences, with a disjuncture between the work that is funded to tour and what promoters and venues want to present. There are calls for a more strategic and integrated approach, with better defined relationships between touring companies and venues and an increased focus on the role of producer as a bridge between artforms and audiences (Burns and Harrison, 2009; Millman and Myers, 2009). Similarly, there may be a need for a more strategic approach to collecting to ensure that the nation's art collections are seen and used by the public.

4.3.6 Arts organisations and their audiences

There is a reasonable amount of literature providing insights to arts organisations on how they can best reach out to and engage existing and new audiences, although more could be done to bring this literature together to identify common themes and to share learning. One of

the strongest messages for arts organisations is the need to put the audience at the centre of what they do. Leadbeater (2005) calls for arts organisations to develop more of a two-way dialogue with the public, building trust and intimacy and involving audiences in evaluating and shaping work. It is argued that a deeper level of public engagement would promote greater debate and new perspectives, driving both artistic and organisational innovation (Mission Models Money, 2007). There is also scope for arts organisations to consider themselves more as public spaces for socialising and interaction – welcoming places that are integral to and a focal point of local community life (Johnson et al, 2004).

There is plenty of advice available to arts organisations on effective marketing, much of which is based on the importance of in-depth audience research, including better tracking of audiences, improved audience profiles and understanding audience reactions and experiences. As noted in section 3.2.2, a key gap in the evidence base is ongoing research to measure the individual and collective reach of publicly funded arts organisations. This research is seen as critical if organisations are to hold themselves to account and funders are to fully assess the impact of their investments (Jackson and Jordan, 2006). There are calls for better sharing of data and intelligence across the sector and audience development as a whole is a key area where arts organisations are seen to need an innovative and sustained collaborative approach (Johnson et al, 2004).

4.3.7 Technology and media

Finally, there is a growing body of literature on the potential of digital distribution and new forms of digital engagement to transform the way people experience the arts and the way arts organisations interact with their audiences. Currently, however, there is little empirical evidence that the arts are reaching new audiences through digital means. Qualitative research by Synovate (2009) found low levels of public awareness of 'arts in the digital space'. The research found that while many people are uploading photos and downloading music, they are reluctant to see this kind of activity as 'art'. In fact, people express concern that digital experiences may overtake the live, at the expense of the valued social interaction

that is seen as a key element of many live arts experiences. Further, people are even less confident about engaging with the arts virtually than they are in the 'real' world. The quantity of online content is overwhelming and there is a desire for trusted brands and aggregators to guide users and help them to locate high-quality, relevant content. Despite the claims made for user-generated content, the study suggested that active creation and participation in the arts online is very much a niche activity. However, people see the potential of digital as a valuable complement to the live, offering the opportunity to tailor and deepen the experience, to self-educate in a highly personalised and empowering way, to access experiences that would otherwise be impossible because of cost or location and to take the plunge in trying something new in a safe environment.

Research among Arts Council-funded organisations shows that the majority have an online presence and are making active use of social networking sites. Most websites of funded organisations are basic marketing sites, with a handful of standout examples operating as 'multi-platform cultural institutions'. However, among funded organisations there is a lack of digital resources that can be personalised, with little openness or responsiveness online, and discoverability remains a challenge. Many of these websites suffer low Google PageRank scores and low audience numbers (MTM London, 2009).

Overall, it appears that arts organisations and their funders are not yet doing enough to seize the opportunities offered by digital technologies to grow audiences. There are calls for more expansive, innovative websites to be part of the core business of all arts organisations, with more original content, more opportunities for personalisation and interaction and more integrated, multi-layered experiences (Tusa, 2007; MTM London, 2009; Synovate, 2009). There is also scope for greater digital distribution in cinemas and through public broadcast screens, with the Royal Opera House and National Theatre providing pioneering examples.

Research has found that publicly funded arts organisations typically have digital ambition but lack the formal strategy, budgets, capacity and mindset to undertake the organisational development required, with few resources set

aside for digital content creation (Arts Magnet, 2006). There are calls for the Arts Council and other funders to audit and set benchmarks for the technology capacity of the sector, to provide low cost access to platforms, to offer training and support (particularly in relation to the impact of digital development on business models) and to promote knowledge transfer and sharing of best practice (Knell, 2006; Mission Models Money, 2007; MTM London, 2009). MTM London (2009) also concluded that there was a need for greater investment in the strongest digital innovators; this investment could be made through a 'digital challenge' fund in partnership with major public and private technology partners.

Finally, this review examined literature that touched on the role of broadcasters and new approaches to public service broadcasting in growing arts audiences. While traditional arts programming may be under pressure, there are opportunities for arts organisations to become public service content commissioners and distributors themselves, with organisations like Tate leading the way. However, only a small minority of Arts Council-funded organisations are currently producing content that meets public service characteristics, and these tend to be major institutions with strong brands and small, digitally literate organisations with a multi-media focus (MTM London, 2009). As such, there is potential for greater partnership between broadcasters and arts organisations (Department for Culture, Media and Sport and Department for Business Innovation and Skills, 2009). The BBC in particular is felt to have an enormous resource to offer in terms of access to technology, skills development and support with archiving and intellectual property issues. Talent for creative public service content delivery may emerge more from the margins than from established institutions, and collaboration is needed between new entrants developing innovative content and established organisations and broadcasters with mass reach.

To conclude this section, not only is the evidence base on audiences now highly developed, it has also been analysed effectively to generate considerable insight into how arts engagement might best be encouraged. The key challenge appears to be to harness this wide-ranging evidence base into a consolidated and widely shared and understood body of knowledge that is

used to drive changes in policy and practice. Apart from the need to generate better data to measure the reach of publicly-funded arts organisations, arguably the most important gap in the evidence base is a lack of empirical research on the nature and impact of the artistic experience itself. What actually happens when individuals experience the arts? What are the factors that affect this and what is the wider impact on people's lives? As noted in section 3.1.6, a systematic programme of research in this area is necessary to fully gauge the public value of the arts. Finally, there is a need for better quantitative data on digital engagement with the arts, which is not covered extensively by the Taking Part survey at present.

4.4 Every child and young person has the opportunity to experience the richness of the arts

There is widespread agreement in the literature about the importance of enabling children and young people to engage with the arts and develop their own creativity. The primary rationale is that ensuring frequency and quality of engagement from an early age will help to build future demand for the arts. There is now evidence of the strong effect of childhood experience on future levels of engagement, with research finding that people who were encouraged by their parents to attend and participate in the arts when young are significantly more likely to engage as adults (Oskala et al, 2009). Furthermore, it is argued that increasing the exposure of young people to the arts will improve their knowledge and understanding of the sector, fostering interest in a career in the arts or wider creative industries and increasing the flow of creative talent (Institute of International Visual Arts and Arts Council England, 2008).

There is also now evidence of the wider impact of arts engagement on informal learning outcomes for children and young people. Interventions in schools and education programmes by arts organisations have been found to deliver a host of benefits to children and young people in terms of personal development, including increased self-esteem, creativity, cultural confidence, maturity, sense of belonging, critical thinking, risk-taking, aspirations and resilience and improved social,

team and problem-solving skills (Halsey et al, 2006; Jancovich, 2007; Hayton Associates, 2008; Houghton, 2008; Creative Partnerships, 2007). Research finds that arts interventions provide a social form of learning, enabling sharing of experiences (Houghton, 2008). They are also reported to be effective in engaging children and young people from diverse backgrounds and transformational for young people at risk (Bond, 2007; Jancovich, 2007). There is less evidence of the impact of arts engagement on formal learning outcomes. However, evaluation of the Creative Partnerships programme found that participants achieved significantly higher levels of educational attainment than young people in the same schools not attending Creative Partnerships activities (Creative Partnerships, 2007).

There is an important policy context for arts activities focused on children and young people. The government's agenda for children and education creates a range of opportunities for embedding the arts from an early age, including a focus on 'positive activities for young people', extended schools, Building Schools for the Future and investment in volunteering placements for young people (Roberts, 2006; Department for Children, Schools and Families, 2007; HM Government, 2009). The aim is to take a joined-up approach across public services with a view to creating positive outcomes for children and young people, ensuring they enjoy childhood as well as prepare for adulthood. The arts are seen to have an important contribution to make to this agenda.

Levels of arts engagement among children and young people are relatively high. In 2007 74% of 11–15 year olds attended an arts event at least once in the previous 12 months (although the majority attended just once or twice). Theatre was the most popular event with an attendance rate of 42%. Active participation levels are even higher. In 2007 92% of 11–15 year olds participated in at least one arts activity, the majority participating at least once a week, outside as well as inside school (Department for Culture, Media and Sport, 2008b). If the definition of arts engagement is widened to encompass a host of activities including reading and writing, then the vast majority of both 5–10 year olds and 11–15 year olds are engaged: 97% and 99% respectively in 2008/09 (Department for Culture, Media and Sport, 2009a). Young

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people report high levels of enjoyment of arts engagement (Department for Culture, Media and Sport, 2008b). However, levels and frequency of engagement vary and inequalities have been reported along socio-economic lines, with children whose parents have no educational qualifications less likely to be highly active culturally. Further, girls are found to engage significantly more than boys, but no differences have been observed in terms of ethnicity or disability (Department for Culture, Media and Sport, 2009a).

In 2008/09 Arts Council-funded organisations collectively put on 13,475 performances for children and young people and achieved nearly 5 million attendances at education and learning sessions (Arts Council England, 2009a). Improvements have been recorded in work for children and young people by theatres, with more good work, greater investment and co-production since 2001/02 (Millman and Myers, 2009). Visual arts organisations are reported to be spending more on learning, with education more prominent at management and board level (Houghton, 2008).

Beyond the ongoing activities of funded organisations, a number of high-profile, intensive delivery models have been developed which have transformed the landscape for children and young people and the arts. Extensive evaluation of the Creative Partnerships programme found a wide range of impacts above and beyond the effect on educational attainment noted previously. These impacts included head teacher perceptions of improved pupil confidence, ability and enjoyment of school; a positive impact on the professional development of practitioners; and gains in literacy and maths and increased risk-taking, collaboration and resilience among participants highlighted by an Ofsted report. Creative Partnerships has been found to be a particularly successful model for engaging individual practitioners and small organisations as providers (Creative Partnerships, 2007). Another model is provided by the Cultural Hubs programme, which was found to have successfully developed relations between schools and cultural organisations, strengthening the centrality of learning within cultural organisations (Hayton Associates, 2008), while Artsmark has helped to raise awareness of and enthusiasm for

the arts in schools (Matthews Millman, 2006). Arts Award is a national qualification, accredited by Trinity Guildhall, which works through schools or arts organisations to enable young people to develop skills across all art forms. Since its launch in 2005 nearly 23,000 young people have achieved awards through the programme².

Overall there is a rich array of creative activity for children and young people, with a proliferation of programmes, projects and agencies working in this area in recent years. The key question presented by the literature is whether increasing levels of provision are creating more opportunities for children and young people and their families who are already highly engaged with the arts, rather than reaching out to those with least engagement. In addition, there are concerns that the current approach is too fragmented, and that existing initiatives are insufficiently connected and not necessarily complementary (Roberts, 2006). It has been argued that too much education work by the arts and wider cultural sectors is sporadic, delivered through short-term project funding by often part-time or voluntary staff. It is also noted how expensive it is to engage people well, particularly those who are less advantaged (Jackson and Jordan, 2006; Bond, 2007).

In terms of future directions, the prominent argument is that there is a need for a holistic, integrated, collaborative and long-term approach, ensuring high-quality, sustainable creative and cultural opportunities for children and young people that meet their needs and aspirations (Roberts, 2006; Culture & Learning Consortium, 2009; Institute for Public Policy Research, 2009). Guiding principles suggested by the literature include a focus on children and young people most disadvantaged in terms of social exclusion and economic deprivation; a shared and embedded definition of cultural and creative learning across the arts and education sectors; and greater continuity of provision through long-term programmes (Hayton Associates, 2008; Culture & Learning Consortium, 2009; Institute for Public Policy Research, 2009).

Perhaps most importantly, much of the literature emphasises the importance of a more inclusive approach to developing programmes for children

² See <http://www.artsaward.org.uk/site/?id=2055>

and young people, with a view that services and activities should be responsive to and shaped by children and young people themselves (Bond, 2007; BOP Consulting, 2009). There is a perceived need for consultation and dialogue to understand young people's attitudes and needs, with digital technologies and social media offering opportunities for greater interaction and empowerment. Interestingly, there is far less concern about the direct involvement of children and young people in decision-making than there is about involving the public more widely (see section 3.4).

In delivering a more coordinated approach there is thought to be scope to enhance both the supply of and demand for arts programmes for children and young people. First, there are repeated calls in the literature for children and young people to be central to the core mission of arts organisations, with education and learning a priority for arts leaders (Mission Models Money, 2007; Tusa, 2007). There is a perceived need to build the capacity of the arts sector to deliver high-quality work through professional development, network and peer support (Bond, 2007; Houghton, 2008). There are arguments for building the cultural knowledge and skills of the early years workforce, raising awareness of the role of artists and arts organisations among schools and local authorities, and, critically, embedding and foregrounding the arts in the formal curriculum in a way that is responsive to the needs of schools, teachers and young people (Roberts, 2006; Culture & Learning Consortium, 2009). There is also a call to match supply and demand by further brokering sustained collaborations between arts organisations and schools (Leadbeater, 2005).

Perhaps here more than in any other area of the arts partnership is seen as critical – there needs to be a multi-agency approach to meeting the needs of children and young people. There are calls for more joined-up leadership across central government departments, joint action by the arts and wider cultural and education sectors and stronger connections between the arts, education and children's services provided by local authorities (Roberts, 2006; Institute for Public Policy Research, 2009). The literature suggests that the Arts Council has an important advocacy and brokering role, ensuring the arts feature within wider central and local government

agendas for children and young people and enabling artists and arts organisations to be at the forefront of educational opportunities and work effectively within the landscape of children's services.

To conclude, the evidence base on children and young people and the arts is substantial and growing, and the priority at this stage appears to be greater joining up, sharing of data and meta-analysis to map the extent and impact of current provision more comprehensively. In addition, this review found little evidence on the artistic and cultural tastes, preferences and experiences of children and young people. This will be an important gap to plug in order to understand more fully what the next generation of creators and consumers might look like.

4.5 The arts sector is sustainable, resilient and innovative

There is now a useful body of literature exploring the opportunities for artists and arts organisations to increase their impact, diversify income streams and become more embedded in public life by engaging with and contributing to wider social and economic agendas. There is also evidence of the ability of the arts to make a demonstrable impact on these agendas, although the coverage and quality of this evidence is patchy.

There are opportunities for artists and arts organisations to become more central to and integrated in the creative economy and to support innovation in the wider economy. Research has generated useful case studies of organisations contributing to knowledge exchange across business and higher education, connecting to teaching programmes in universities, supporting new graduates, building skills and talent and nurturing new creative businesses, for example by providing incubation and start-up spaces (Tom Fleming Creative Consultancy, 2009). If they are aware of the possibilities, artists and arts organisations are able to expand their networks and access resources through research and development, technology and innovation-based partnerships with universities, research councils, regional development agencies and bodies such as the National Endowment for Science,

Technology and the Arts and the Technology Strategy Board. Access to traditional financial services has previously been found to be limited for creative businesses (Jeffreys, 2004). However, regional beacons for the creative industries are aiming to raise awareness of the sector about business support. Strategic frameworks are being trialled in the North West and South West regions to improve coordination of regional engagement with the creative economy, and sources such as Enterprise Capital Funds offer a mix of public and private money to small high-growth businesses seeking risk capital (Department for Culture, Media and Sport, 2008a). There are calls in the literature for arts organisations to better exploit their assets and intellectual property (Leadbeater, 2005; Bolton and Carrington, 2007), with particular opportunities presented by digital technologies and the emerging public service content economy. However, this review found little empirical research on the factors that enable successful commercialisation in the arts.

An increasing area of interest is the role of the arts in 'place making', and in helping to shape places that are creative, distinct, have a strong sense of identity and are attractive to live and work in and to visit. The concept of 'culture-led regeneration' has received considerable attention in recent years, and there are numerous examples of existing arts organisations and new capital builds being at the forefront of efforts to revitalise some of the more run-down parts of major English cities. Case studies suggest that arts organisations can help to attract inward investment and cultural tourism, building the image and brand of places (Tom Fleming Creative Consultancy, 2009). The arts are also part of a wider debate about the quality of design and its contribution to quality of life, and there is discussion of the potential of art in the public realm to help reflect the history of a place and the ideas and experiences of the local community, integrating the arts more closely into everyday life (Living Places, 2009). There is increasing evidence from the European Capital of Culture programme on the impact of year-long, city-wide cultural programmes. In particular, evaluation to date of Liverpool 08 found an overall growth in visitors to Merseyside attractions, a significant short-term increase in total income and employment of the arts sector in the city and consistent growth in the number of references to the Liverpool cultural

sector in national and international press coverage in the period leading to and during 2008 (Impacts 08, 2008). Overall, however, the evidence base on the effects of culture-led regeneration and the broader contribution of the arts to place making remains underdeveloped, particularly in relation to the sustainability of impacts.

In recent years there has been a substantial increase in partnership working across the delivery of public services, with the recognition that complex and long-standing social problems require joined-up solutions. Local authorities are the major funder of the arts in England, but as pressure increases to reduce expenditure, local authorities will increasingly need to focus on their 'core' services, and the negative impact on arts funding could be substantial. This suggests that artists and arts organisations will need to be imaginative and proactive in considering how they can contribute to the most pressing overarching priorities of different local authorities, forge stronger public sector partnerships and work as part of a wider collaboration to help communities to thrive. This is not just a question of accessing additional resources for the arts – working across a range of social issues and diverse communities is thought to be valuable in expanding and diversifying artistic practice, stimulating innovation and building new forms of audience experience and engagement, often outside traditional settings (Jermyn, 2004). Local services will increasingly be delivered through procurement and commissioning models within clear performance management frameworks. Any artist or arts organisation wishing to engage with local service delivery will need to know how to navigate these systems. Similarly, recent work on participatory budgeting and the arts suggests that the increased emphasis by local authorities on the involvement of local people in setting priorities and allocating budgets will require artists and arts organisations to ensure they are fully embedded in and responsive to their communities (Fennell et al, 2009).

There are now a number of well-documented areas in which the arts are perceived to be helping to counter wider social challenges. Research has found that arts projects designed to tackle social inclusion have had positive effects on participants including raised self-esteem and confidence, greater sense of self-determination and the

development of creative skills (Jermyn, 2004). Rural touring and 'village hall' arts experiences are found to help to bring people together, particularly in growing communities with less stable populations (Matarasso, 2004). There are also case studies of arts interventions helping to increase and maintain the economic and social participation of older people and combat social isolation (Harris, 2009). However, as with place making, there is little empirical evidence of the impact of the arts at a wider community level, particularly in relation to the development of social capital.

There is now a strong body of evidence on the impact of arts interventions on health outcomes, primarily in clinical settings, with studies showing that arts projects can help to deliver a range of positive clinical outcomes. There is evidence that arts participation can contribute to empowerment and social inclusion for those with significant mental health issues (Secker et al, 2007). However, the evidence of the contribution of the arts to health and well-being outside clinical settings is less extensive and robust.

Evidence of the impact of arts programmes in the criminal justice system is now reasonably well-developed. Hughes (2005) found that arts programmes are associated with a range of outcomes including changing the way individuals respond to conditions that lead to offending, the development of new skills and improved institutional culture and practices. There is evidence that arts programmes are associated with reduced offending behaviour among young people, and that they help disaffected young people to re-engage with education. Hughes concluded that arts programmes in criminal justice may be particularly effective because of their non-institutional, non-judgemental, social nature, with creative processes involving both structure and freedom, responsibility and collaboration. However, research is still needed to assess whether the effects of arts interventions are sustained in the long term.

Children's services remain a core priority for local government, and arts engagement by children and young people is considered in more detail in section 4.4. In the broader learning environment there are currently opportunities for artists and arts organisations presented by the cross-government commitment to adult informal

learning. Opening up their facilities to promote informal learning may enable arts organisations to develop new partnerships, new revenue streams and new audience relationships (Department for Innovation, Universities and Skills, 2009).

Beyond the public sector, there is now a well-established research agenda on private investment in the arts and in culture more widely. Private investment levels have grown to an all-time high since tracking began of £687 million in 2007/08. Individual giving is the major contributor to private investment and was up by 25% in 2007/08 (Arts & Business, 2008). There is seen to be scope to further promote individual giving through friends' schemes and membership deals, by growing the number of low and mid-level donors, through schemes that encourage employees in the wider workforce to donate, for example to a cultural endowment fund, and by creating better fiscal incentives for private giving, especially works of art (Jackson and Jordan, 2006; Bolton and Carrington, 2007; Arts & Business, 2008). Business investment is falling and is expected to drop further as a result of the recession (Mermiri, 2009). However, the emergence of 'cultural brands' and the perceived ability of culture to connect with and engage consumers may help to retain business interest, and the outlook is more optimistic for 2011 (Arts & Business, 2008).

Overall, the literature identifies a wide range of public and private 'markets' that artists and arts organisations can choose to operate in, and each presents different possibilities in terms of income sources and partners. While there are many opportunities, navigating this territory is found to be immensely challenging (Tom Fleming Creative Consultancy, 2009). To engage with technology and innovation agendas, to commercialise effectively, to become a key provider of local services and to fundraise successfully from the private sector all require organisations to maintain high levels of expertise, capacity and relevance. There is always the danger of 'mission-creep' – being pulled in too many different directions by the demands of diverse funders, investors and partners. It is argued that arts organisations need to be able to make purposeful and strategic choices about the directions that will contribute most to their mission and where therefore to concentrate their energies. This focus is thought to enable organisations to establish a set of clear

4 The Arts Council's goals

'products' for different stakeholders and operate across multiple agendas with skill and dexterity, exploiting the synergies between different aspects of their work (Tom Fleming Creative Consultancy, 2009).

The literature suggests that the Arts Council has a role to play in building the capacity of the sector to operate in this way and in brokering relationships both within the arts and between the arts and other parts of the public and private sectors. In particular, the arts sector is seen to need support in working effectively within local government structures. In recent years the Arts Council has worked to establish more formal relationships with local government, including through the Cultural Services Improvement Unit at the Improvement and Development Agency for local government (Department for Culture, Media and Sport and partners, 2008). New regional structures offer opportunities for a more joined-up approach to improving service delivery across culture and sport. There has been much work undertaken to embed culture and sport in local area agreements and 39 local authorities are currently working towards targets to increase arts engagement, supported by the Arts Council. The Arts Council has also worked to engage planners and developers, most recently by providing guidance on recommended levels of cultural provision in a development or regeneration programme. Overall, this activity suggests a more strategic dialogue is now taking place between central and local government and culture and sport agencies. This kind of united approach is seen as increasingly important in a difficult economic climate, and stakeholders would like to see the Arts Council collaborate further and improve its brokering role (Ipsos MORI, 2010).

The development of the evidence base will be particularly important to the successful delivery of this goal and there are key gaps to fill, particularly in relation to the impact of the arts at community level and in place making; better quality research into long-term effects of arts interventions in all contexts; more empirical research on the factors that contribute to successful commercialisation by arts organisations; and more fit-for-purpose classifiers for mapping the creative industries. These are all areas of research that will require a collaborative effort across agencies.

5 Improving the evidence base

5.1 The nature and quality of the evidence base

A long-standing concern of cultural policy commentators has been the lack of high-quality, robust evidence on arts and culture, particularly in relation to impact (Selwood, 2002; Oakley, 2004; Galloway, 2008). There is much debate in the cultural sector and a vast body of work beyond on what constitutes 'high-quality' evidence, particularly in the context of policy making. Evidence is generally judged by measures of technical competence – how well the methodology employed adheres to the principles of scientific enquiry. The orthodox hierarchy prioritises the randomised control trial as this enables comparisons to be made between the group under study and a control group, specifically selected to minimise any bias in the research design. Below randomised control trials come methodologies that include some kind of control group and measure pre- and post-intervention. This enables better understanding of the scale of any observed effect, and helps the researchers to consider whether the effect may have happened anyway. Beyond methodology, however, fitness-for-purpose is also seen as an important criterion in judging the quality of evidence. The Evidence for Policy and Practice Information and Coordinating Centre's 'Weight of Evidence' framework combines methodological soundness as well as the appropriateness of the research design and the relevance of the study focus to the question in hand (Gough, 2007).

Common criticisms of evidence in the arts and cultural sector include the blurring between advocacy and research, over-reliance on anecdotal evidence collected unsystematically and the ad hoc nature of many studies. It is argued that the small-scale methodologies employed generate evidence that is 'not so much "bad" or "worthless", but is incapable of supporting the often grandiose claims that are made for it' (Oakley, 2004). A particular problem is the presentation of short-term impact as evidence of a longer-term change (Selwood; 2002; Oakley, 2004; BOP Consulting, 2006). In fact there are pockets of very good evidence on impacts, particularly in relation to health and learning and, to a lesser extent, regeneration. A recent review for the Scottish Arts Council of the literature relating to impact found 'a strong body of work on arts and health, mainly in the form of literature and systematic reviews' (Galloway, 2008). However, much of this research is focused on interventions in very specific contexts, such as clinical outcomes of arts programmes in healthcare settings. The evidence of impact in these highly controlled environments is not necessarily directly applicable to the mainstream business of arts funding. Part of the underlying problem is that the advocacy demand for evidence concerning the impact of the arts – particularly in relation to wider social and economic agendas – may be directing attention away from research that tackles the core business of what the objectives of arts funding should be and how they can best be achieved.

As described in chapter one, rather than examining evidence of the impact of the arts in detail, this review focused on literature exploring the wider context in which the arts operate, the challenges and opportunities ahead and how the arts funding system does or should work. The evidence review therefore needed to incorporate a wide range of types of literature from empirical research to policy documents to opinion pieces. Some of this evidence was very good quality and covered key issues extensively – for example, section 4.3 finds that research into audiences is highly developed, with a wealth of high-quality data and sophisticated analysis available. In other areas much of the literature reviewed was low quality in terms of scientific design – large numbers of reports were based on expert views or sector consultations and therefore represent opinion rather than empirical findings.

While the quality of the literature varied considerably in terms of scientific design, a high degree of scientism may not always be necessary or appropriate in helping the Arts Council to understand how it can better meet the needs of the sector and the wider public in the future. When the references included in this review were pulled together and considered as a body of evidence, they were able to illuminate problems and provoke debate and new ways of thinking about the function and activities of the Arts Council – which arguably may be the most important role of research in cultural policy making (Belfiore and Bennett, 2010).

However, drawing on evidence from consultation reports and opinion pieces remains problematic because conclusions can be swayed by literature that is influential because of the skill of the author or commissioner in promoting the work, rather than the inherent quality of the data presented. A key limitation of this review is that the scope did not allow for a more systematic review of the academic literature on particular issues. With more resource and better connections with higher education, the Arts Council and the wider arts sector could tap into the wealth of academic research that is often under the radar from a policy perspective but would generate a great deal more insight into the necessary conditions for successful investment in the arts.

5.2 Use of evidence

The main weakness with the evidence base identified during this review was not a lack of evidence as such – despite the gaps and quality issues noted previously – but the extent to which the evidence has been used to date. For instance, the high quality of much audience research does not appear to have generated a greater shared understanding of what works and what does not work in engaging people with the arts, nor to have directly brought about substantial changes in the arts funding system. In general it is difficult to see any cumulative impact of the evidence base on policy or practice; the Arts Council is encouraged to learn better from experience and incorporate previous evaluation findings systematically in the design of future programmes (Young, 2006; PriceWaterhouseCoopers, 2008a).

This problem needs to be addressed by connecting research and evidence up to a more systematic process of policy development and decision-making, and the Arts Council's proposal for long-term goals provides a framework within which this can happen. Once the Arts Council's goals have been agreed in partnership with the sector and wider stakeholders, there needs to be a structured approach to analysing how they can best be achieved. This should start with a fuller stock-take of the available evidence in relation to each goal, a more in-depth review of what has worked in the past, and an assessment of the strengths and weaknesses of different policy options for achieving each goal. Once policy mechanisms have been agreed and put in place, research and evaluation needs to be targeted at assessing the effectiveness of those mechanisms. In this way it will be possible to build systematically a body of knowledge on each of the goals, which will in turn feed into ongoing policy review and development and enable the Arts Council to fulfil its role as a source of advice, intelligence and best practice.

This systematic approach will need to be developed in partnership with a range of agencies, not least because the Arts Council is not the primary body responsible for generating core data in relation to all of the goals. The Culture and Sport Evidence (CASE) programme, a collaboration between the Department for Culture, Media and Sport, the Arts Council,

English Heritage, the Museums, Libraries and Archives Council and Sport England is a positive first step. This review suggests that the Arts Council and partners will need to commit the funding and political will to more large-scale, collaborative research projects to address key gaps.

Overall, there is a need to raise the profile of research and evidence within the arts sector, with increased capacity to understand and use evidence in decision-making, and for the Arts Council to hold itself to account for how well it uses research and evaluation. Undertaking this literature review as part of the process of developing a long-term strategic framework was an important step in pulling together different types of evidence across a wide range of issues. This needs to be seen as the start of a longer process and there is an opportunity now for the Arts Council to demonstrate how well it can use evidence to inform decisions about how its long-term goals can best be achieved.

5.3 Future research priorities

Finally, this literature review identified a number of areas where it would be valuable to conduct either more in-depth reviews into a wider range of existing evidence or additional primary research:

- invest in a systematic, long-term programme of collaborative research on the nature, quality and impact of arts experiences to more fully understand the public value of the arts
- build a more comprehensive picture of how best to systematically develop artistic talent
- consolidate and share the extensive body of knowledge on arts audiences
- create mechanisms for measuring and tracking the reach of publicly funded arts organisations
- produce better data on digital engagement with the arts
- share data to more fully map the extent and impact of current provision for children and young people
- research the artistic and cultural tastes, preferences and experiences of young people and imaginatively forecast future forms of engagement
- develop appropriate definitions in relation to diversity and standardise data collection across the sector
- research the impact of the arts at community level and in relation to place making
- agree fit-for-purpose and standardised classifiers for mapping the cultural and creative industries and generate better empirical evidence on the factors that contribute to successful commercialisation by arts organisations
- access or generate more empirical evidence on the effectiveness of different funding and investment mechanisms in meeting the needs of different parts of the sector and in achieving different goals

In consultation with partners, the Arts Council should work to identify and address research priorities to underpin the delivery and evaluation of its agreed 10-year strategic framework.

Appendix 1: methodology

The literature review was carried out in four stages by a team within the Arts Council's Arts Strategy department.

Stage 1: developing the framework and criteria

The first stage set the scope and parameters of the review. The following research questions were established to guide the search for references to be included in the review:

- how are the arts in England changing? What are the opportunities and challenges ahead? What problems need to be solved?
- what are the broader drivers that might impact on the arts in the future?
- what does England's arts ecology look like? Where do resources come from? How do the funding and support systems work?
- what do artists, arts organisations, arts audiences, the wider public and other stakeholders want and expect from the Arts Council?
- what has the Arts Council set out to achieve previously? What were the results and what can be learned from experience?

In order for a reference to be included in the review it needed to address at least one of the research questions and meet the following criteria:

- published within the last five years, except for references relating to the role and impact of the Arts Council
- published in English
- drawn from one of the following sources:
 - a research study or outcome or process evaluation based on scientific principles, containing primary data gathered using sound methodologies or robust analysis of secondary data
 - a published document setting out the policy or strategy of an organisation
 - a consultation among artists, arts organisations, audiences, the wider public and other stakeholders
 - a think piece or critical commentary by a think tank, cultural leader or policy analyst

Stage 2: identifying references

In the second stage the team conducted a search for references that addressed at least one of the research questions and met the agreed criteria. The search was carried out by trawling the Arts Council's publication archives and other external databases of research. In addition, experts within the Arts Council were asked to provide lists of references that they considered to have been particularly useful or influential over the past five years, including previously unpublished Arts Council documents.

This search generated a list of 854 references which were logged in an Excel spreadsheet. The spreadsheet recorded the title, author, publisher, publication date and brief summary of each reference. Each reference was also tagged according to its relevance to a number of agreed themes including artforms (music, theatre, dance, visual arts, literature, combined arts), arts audiences and participation, diversity, technology and sustainability.

Stage 3: prioritising references

The next stage of the review was to prioritise the long list of references and produce a shorter set for in-depth analysis. The prioritisation process was guided by the following principles:

- quality – with research or evaluation studies based on scientific investigation and robust data considered to be the highest quality type of literature
- relevance – containing information of particular importance in the development of the Arts Council's long-term strategy
- influence – literature that has attracted significant interest or has particular weight for the Arts Council because of its position and status (for example, a policy directive from a sponsoring central government department)
- scope – covering a wide range of artforms, issues or geographic areas

The prioritisation process resulted in a shortlist of 131 references for in-depth analysis.

Stage 4: analysis

The final stage of the review was to analyse the information contained in the 131 priority references. Members of the review team read and summarised each reference using a template containing sections on the purpose and method of the reference, key findings, implications or recommendations for the Arts Council and any further notes on the strength or limitations of the information provided by the reference.

The summaries of all 131 priority references were then collated, analysed and synthesised. Common issues, areas of consensus and points of difference were drawn out and grouped under key themes. Greater weight was given to information from research or evaluation studies based on scientific investigation and robust data.

Using the literature to inform the strategy

The Arts Council developed its proposed 10-year strategic framework alongside the literature review. As such, there was an iterative process by which the emerging intelligence informed thinking about the strategic framework, and the emerging framework identified key points of focus for the literature review.

The first key moment in this process was in June 2009, when headline findings from the literature review were presented at an away day for senior Arts Council staff. Participants at the away day used information from the literature review to prioritise a list of potential long-term goals for the Arts Council, eventually settling on the five goals proposed in the main consultation document. These five goals produced points of focus for the literature review team as in-depth analysis continued from July to November. During this period the emerging strategic framework was repeatedly checked against the findings of the literature review to ensure the Arts Council's understanding of the five long-term goals and how they might best be achieved was informed by the available evidence.

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