



# Stakeholder focus

## General public



July 2014



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## OVERVIEW

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### Objectives

Arts Council England has run an annual survey among the general public since 2009, measuring attitudes among the public to arts and culture. The objectives are to:

- Measure and track public **engagement** with arts and culture;
- Measure and track public **attitudes to arts and culture investment**;
- Explore views on what **public funding** of arts and culture should achieve;
- Assess public **perceptions of Arts Council England**;
- Assess public perceptions of Arts Council England's **decision-making processes**.

### Methodology

ComRes interviewed 3,565 adults aged 18+ in England online between 30<sup>th</sup> April and 13<sup>th</sup> May 2014. Data were weighted to be representative by gender, age, social grade, tenure, work, car ownership and region.

In common with previous years' research, the ICM Direct online panel was used, in order to maintain consistency.

## EXECUTIVE SUMMARY

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### Interpreting this year's results

This year's stakeholder tracking survey represents a substantial shift in survey design and methodology from previous years, with a much larger sample of 3,565 English adults (compared with around 1,700 in previous years) and a heavily restructured questionnaire. In order to maintain some consistency with previous years, the ICM Direct online omnibus panel was used to source respondents, but research and analysis were conducted by ComRes.

While these changes represent a substantial improvement in terms of more precise questions and more detailed insight, they do also mean that some results may not be directly comparable with the results from previous years (even where the same question has been used). This may be due to the addition of preceding questions, which frame respondents' answers in a particular way.

Most importantly, the question reported on page 9 – comparing government spending on arts and culture with a wide range of different policy areas – is likely to have framed arts and culture spending in a different context from a survey referring purely to arts and culture. The new format is more methodologically rigorous, but it means that this year's decrease in support for taxpayer funding of arts and culture could be (at least partially) illusory.

### Analysis

Following steady year-on-year improvements since 2011 on most key performance indicators, this represents a more negative set of results for Arts Council England.

- Support for public funding of arts and culture has dropped from 56% to 39%, although only a quarter (25%) oppose it.
- There has been a significant drop in the number of people saying that public funding of the arts and culture benefits them or their family and friends, from nearly half (47%) in 2013 to just over a third (35%) in 2014.

However, the data also reveals that there are many opportunities for Arts Council England to protect the future of public investment in arts and culture in England.

- The overwhelming majority of people support National Lottery funding of arts and culture (64%) – no change since 2013, but an improvement on 2012.
- People are more likely to think that arts and culture funding decisions should be made by an independent public body (46%) than any other kind of organisation.

- Many people recognise a wide range of benefits that arts and culture brings to life in Britain, including generating tourism (59%), providing entertainment (57%), and educating young people (51%).
- The main benefits people personally feel from arts and culture are entertainment (55%) and a range of educational benefits: educating them as adults (41%), helping them experience things they could not in everyday life (33%), and educating them as children (30%). A further 30% say that arts and culture give them opportunities to socialise and spend time with other people.

As has been seen in previous years, there is a strong class dimension to attitudes towards arts and culture, with affluent ABC1s more positive on a wide range of indicators than less affluent C2DEs.

In a context of slow emergence from economic recession, and deficit reduction the mainstream political position, the challenge remains for arts and culture advocates to prove the value it brings to individuals, communities, businesses, and society as a whole. This research shows that the perceived benefits of arts and culture are very diverse, and felt by different people in different ways.

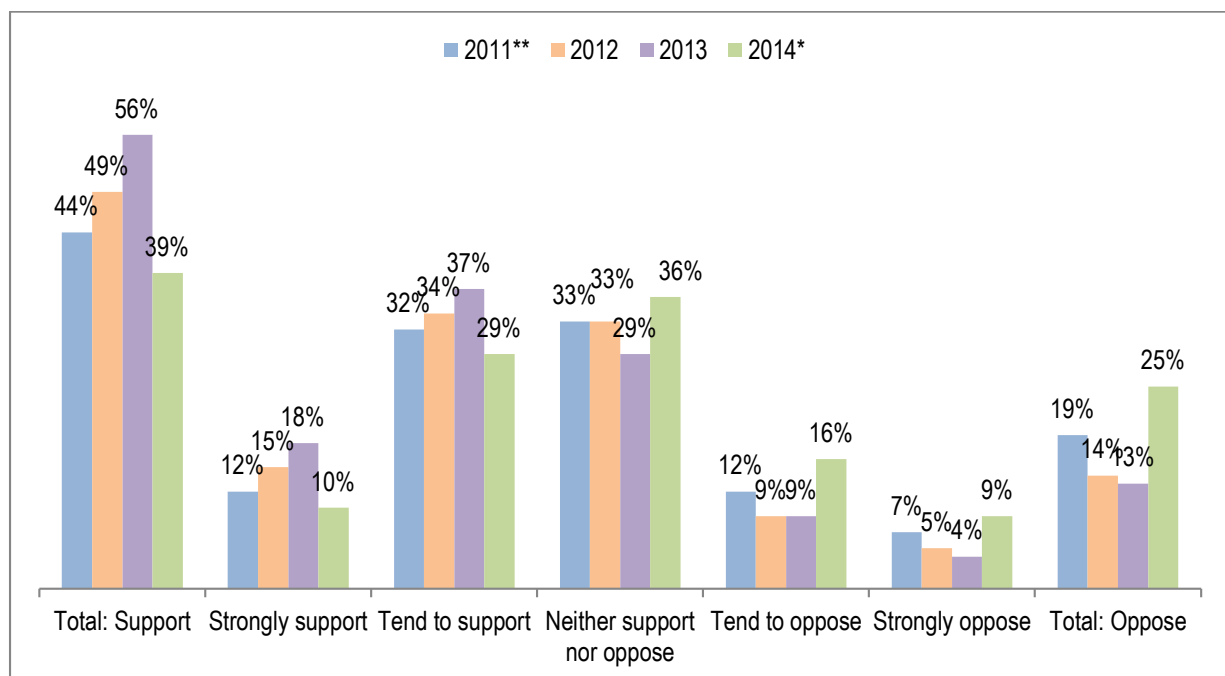
## TRACKING KEY INDICATORS

### Attitudes towards public funding of arts and culture

More people support (39%) than oppose (25%) public funding of arts and culture, but this has narrowed significantly since 2013 (56% supporting, 13% opposing).

Support is highest among those who have attended an arts event (54%), people from affluent AB backgrounds (50%), and particularly people who say they have participated in an informal debate with friends and family (59%) – suggesting that public funding of arts and culture may have elevated levels of support among influential sections of the population. Older people aged 55 and over also show higher levels of support (45%) than those aged 18-34 (32%).

*Q. As you may know, some of the arts in England are funded by the taxes we all pay. To what extent do you support or oppose this public funding of arts and culture?*

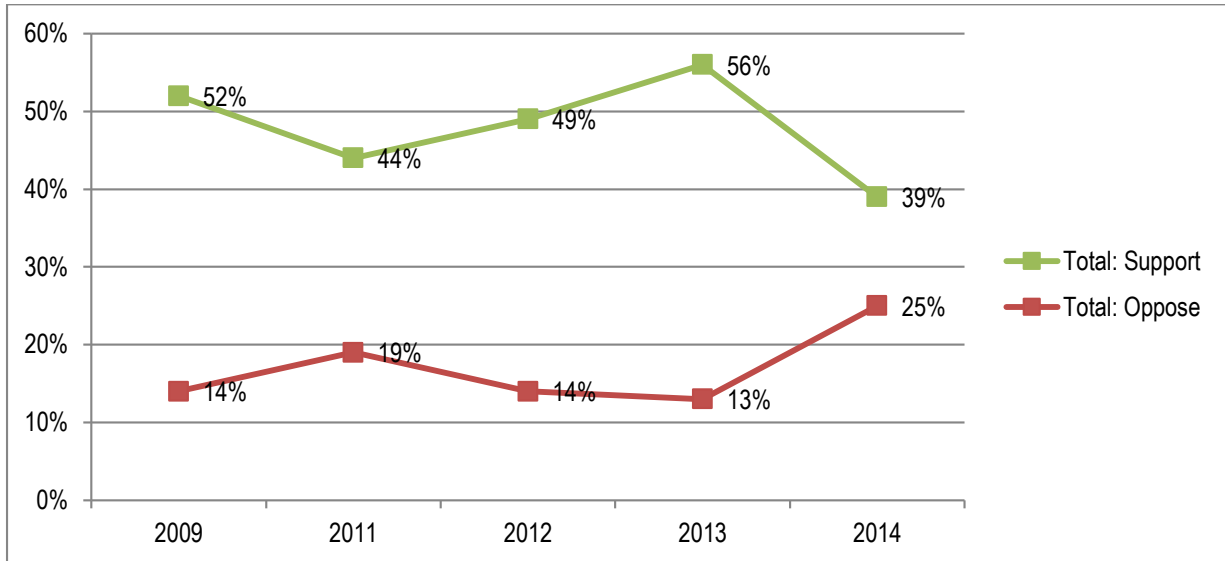


Bases: All England adults 18+ (2014) n = 3,565; All England adults 18+ (2013) n = 1,778; All England adults 18+ (2012) n = 1,750; All England adults 18+ (2011) n = 1,732.

\* A number of new questions were introduced in 2014 which may have affected the way respondents engaged with the survey.

\*\* In 2011, the words "and culture" were not included in the question.

**Time series comparison:** Q. As you may know, some of the arts in England are funded by the taxes we all pay. To what extent do you support or oppose this public funding of arts and culture?



Bases: All England adults 18+ (2014) n = 3,565; All England adults 18+ (2013) n = 1,778; All England adults 18+ (2012) n = 1,750; All England adults 18+ (2011) n = 1,732; All England adults 15+ (2009) n = 1,001.

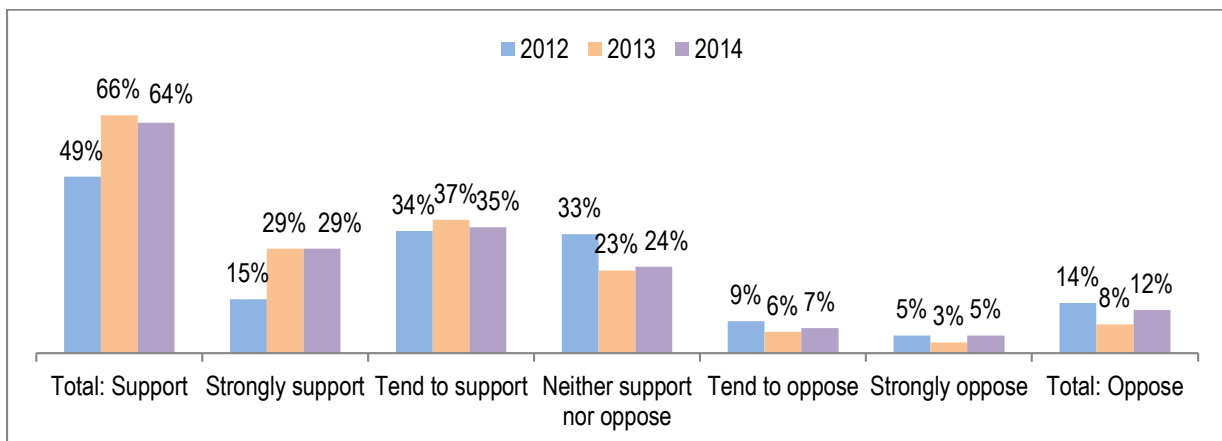
The time series comparison shows that support levels are at a low, with levels of opposition to public funding of arts and culture increasing.

## Attitudes towards National Lottery funding of arts and culture

Support for National Lottery funding of arts and culture has remained constant. Nearly two thirds (64%) support it, compared with 66% in 2013 (a statistically insignificant change). Two fifths (39%) of people who oppose public funding of arts and culture support National Lottery funding.

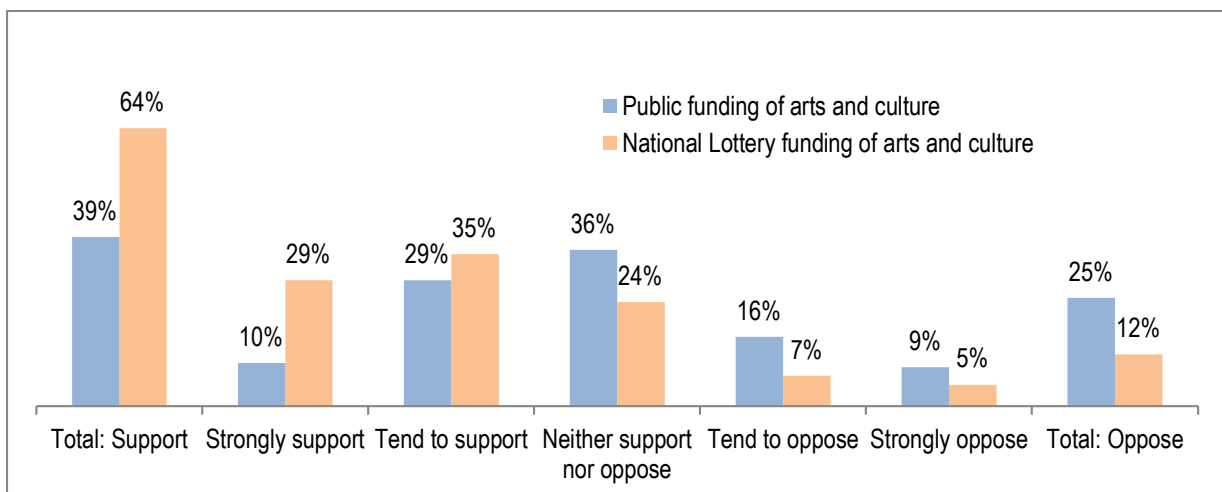
Support for National Lottery funding is particularly high among older people, with 70% of over 65s supporting it, compared with 56% of 18-34 year olds. More affluent AB (70%) and C1 (66%) adults are more likely to support it than less affluent C2s (59%) and DEs (60%).

Q. Some arts and culture in England are funded through the National Lottery. To what extent do you support or oppose this use of National Lottery funding?



Bases: All England adults 18+ (2014) n = 3,565; All England adults 18+ (2013) n = 1,778.

The comparison between support levels of public funding and National Lottery funding is shown below:



Bases: All England adults 18+ (2014) n = 3,565.

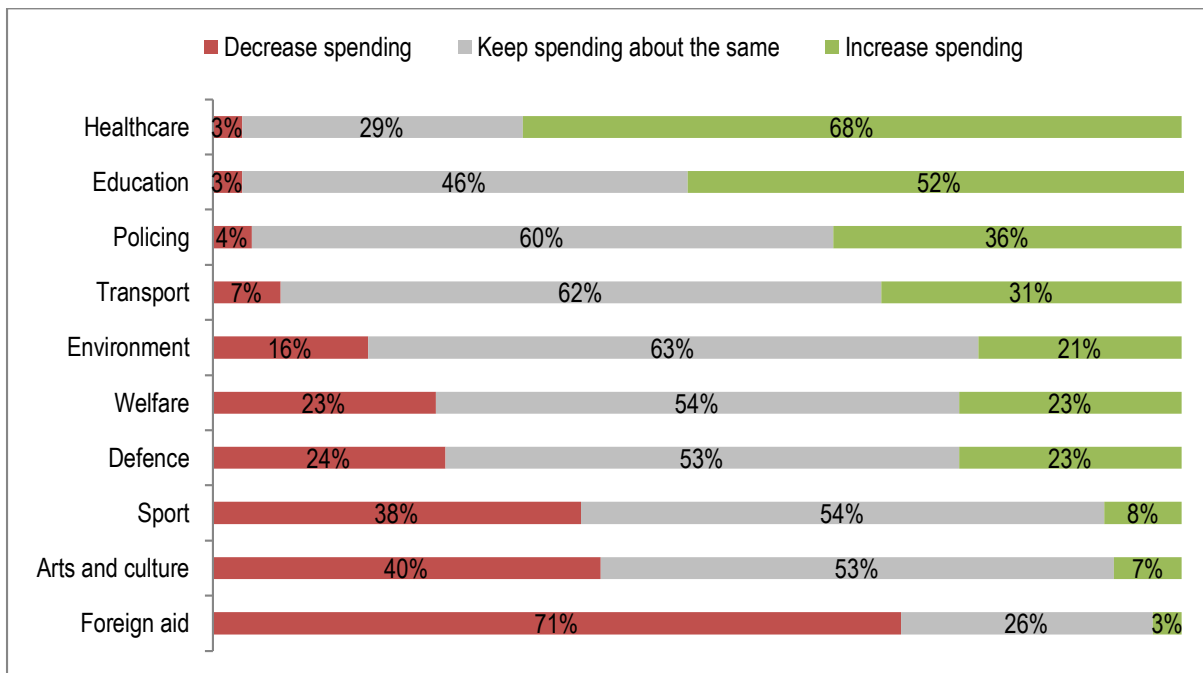


## Attitudes towards public spending in different areas

When asked to indicate whether the government should increase or decrease spending in different areas, arts and culture performs similarly to sport, with most people (53%, versus 54% for sport) saying spending levels should remain about the same as they are now.

The two areas which a majority of people think should receive increased spending are healthcare (68%) and education (52%). This suggests that demonstrating the impact of arts and culture in these areas is likely to be an important way of justifying government investment.

*Q. Below is a list of areas of government spending. For each one, please say whether you think the UK government should increase the amount of money it spends, should decrease the amount of money it spends, or should keep the amount it spends about the same as it is now.*



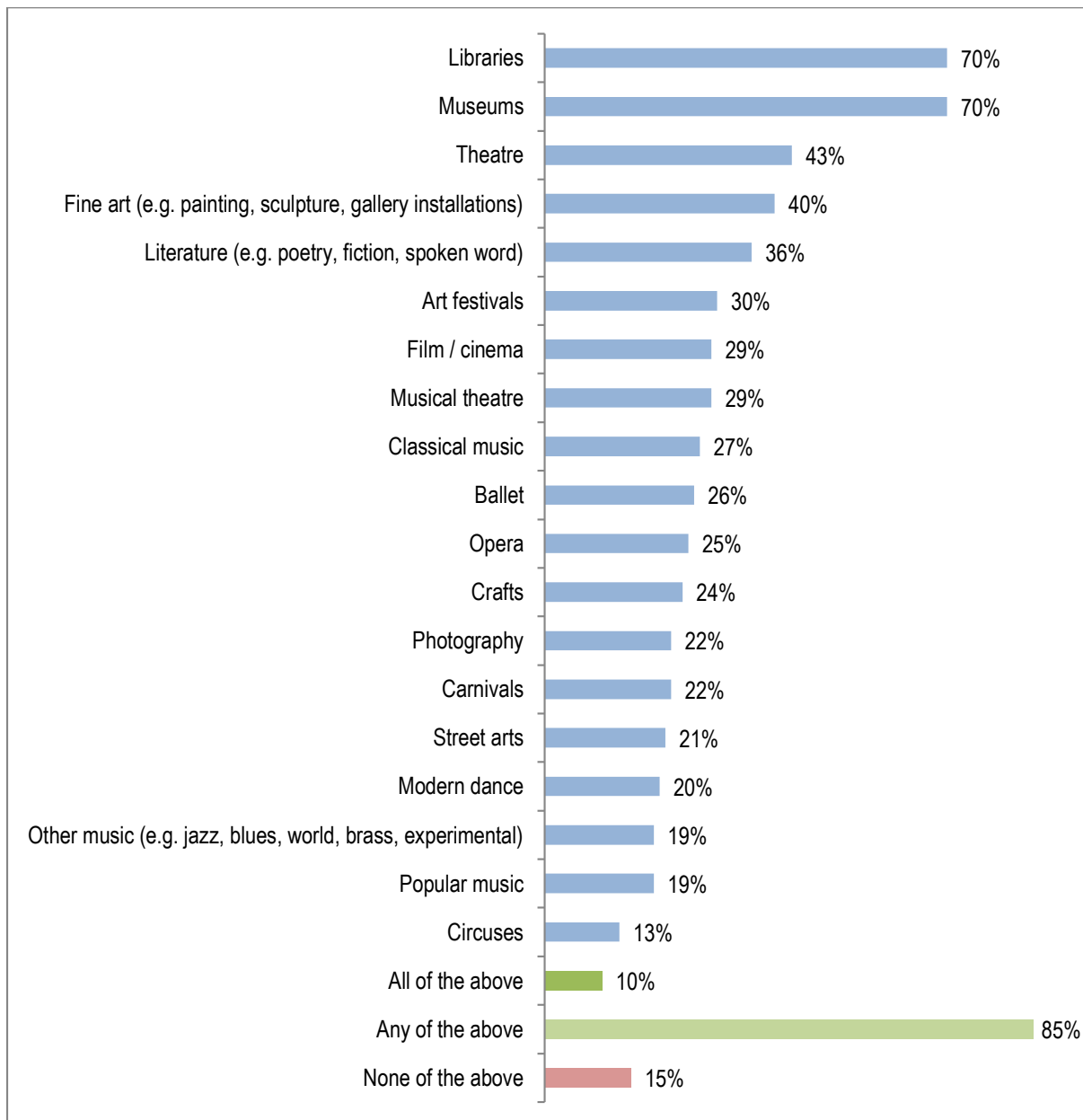
Bases: All England adults 18+ (2014) n = 3,565.

People from less affluent (DE) backgrounds are the most likely to say spending should be decreased on arts and culture (46% compared with 36% of ABC1s). DEs also have the same attitude towards sport, with 45% saying spending should be decreased, compared with 36% of ABs. This pattern does not apply to frontline services like healthcare, education, transport, and policing.

## Public funding of different forms of arts and culture

A clear majority of the public think libraries (70%) and museums (70%) should receive financial support from the government. This is true across all demographics. Theatre (43%) and fine art (40%) also attract support from significant minorities of the public.

*Q. Which, if any, of the following forms of arts and culture do you think should be supported financially by the government?*



Bases: All England adults 18+ (2014) n = 3,565.

The types of arts and culture which people think should be financially supported vary across demographics. Older people aged 65 and over are the most likely to back government funding of most forms of arts and culture. Government funding of theatre, fine art, literature, art festivals, film, and classical music is more likely to be supported by affluent ABC1s than less affluent C2DEs:

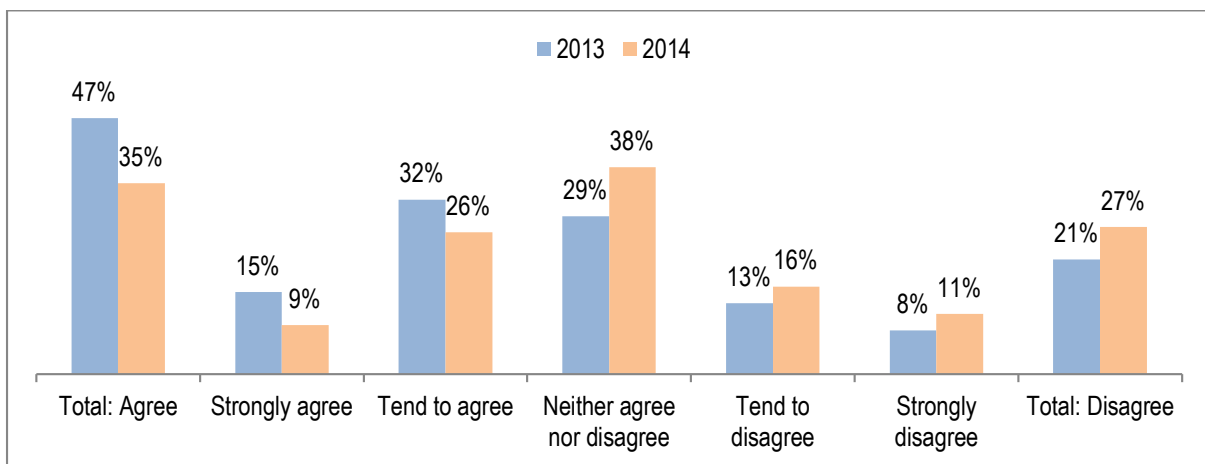
*Q. Which, if any, of the following forms of arts and culture do you think should be supported financially by the government?*

<b>Artform</b>	<b>AB</b> <i>(% support)</i>	<b>C1</b> <i>(% support)</i>	<b>C2</b> <i>(% support)</i>	<b>DE</b> <i>(% support)</i>
Theatre	37%	36%	29%	32%
Fine art	34%	31%	26%	28%
Literature	30%	29%	20%	24%
Art festivals	24%	21%	19%	16%
Film / cinema	24%	21%	18%	16%
Classical music	22%	18%	15%	13%

## Who does public funding of the arts and culture benefit?

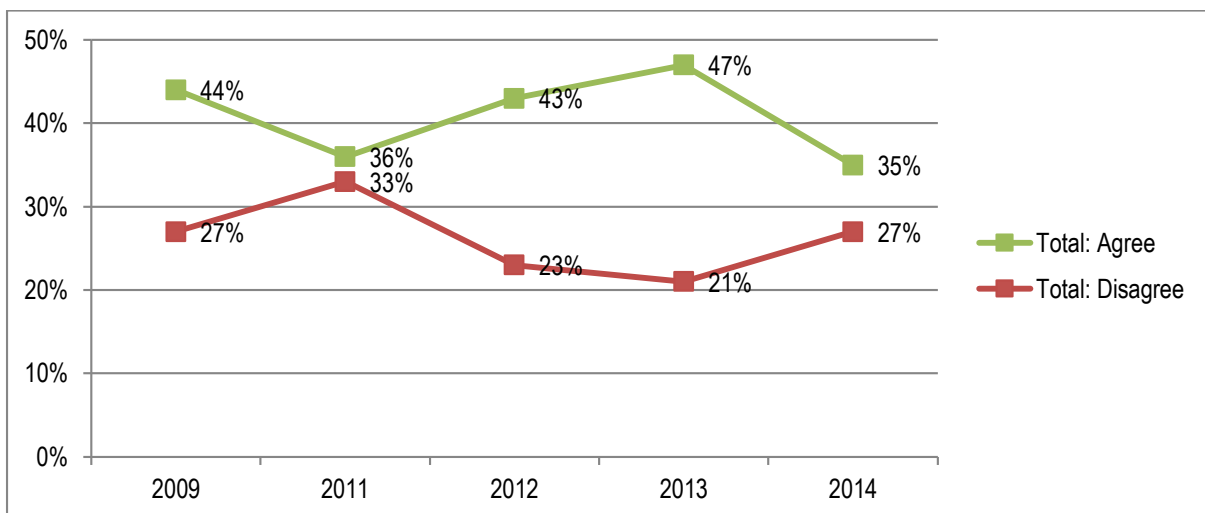
There has been a significant drop in the number of people saying that public funding of the arts and culture benefits them or their family and friends, from nearly half (47%) in 2013 to just over a third (35%) in 2014. More affluent ABs (46%) are much more likely to believe this than C1s (38%), and particularly C2s (28%) and DEs (25%).

*Q. To what extent do you agree or disagree that public funding of the arts and culture benefits you or your family and friends?*



Bases: All England adults 18+ (2014) n = 3,565; All England adults 18+ (2013) n = 1,778.

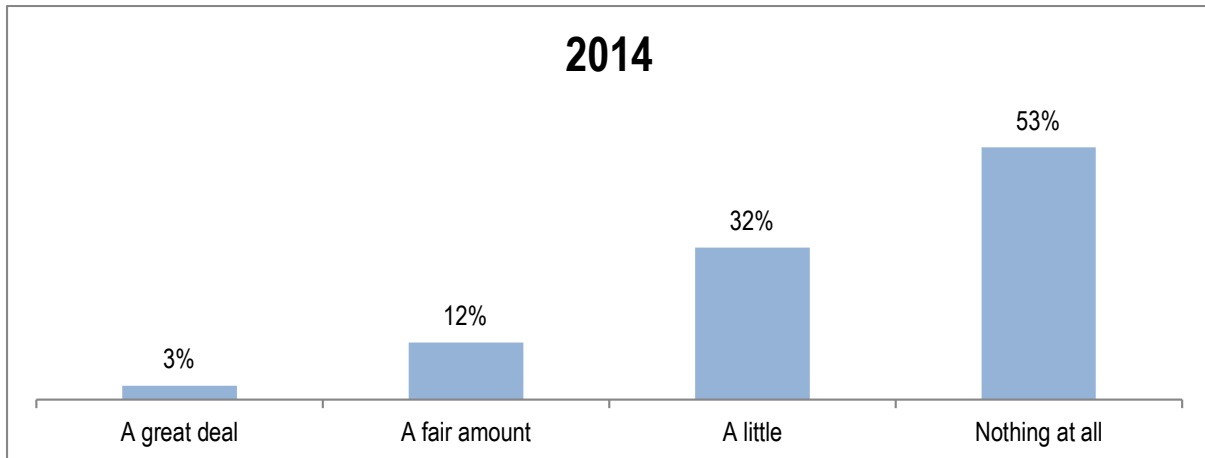
*Q. To what extent do you agree or disagree that public funding of the arts and culture benefits you or your family and friends?*



Bases: All England adults 18+ (2014) n = 3,565; All England adults 18+ (2013) n = 1,778; All England adults 18+ (2012) n = 1,750; All England adults 18+ (2011) n = 1,732; All England adults 15+ (2009) n = 1,001.

## Awareness of Arts Council England

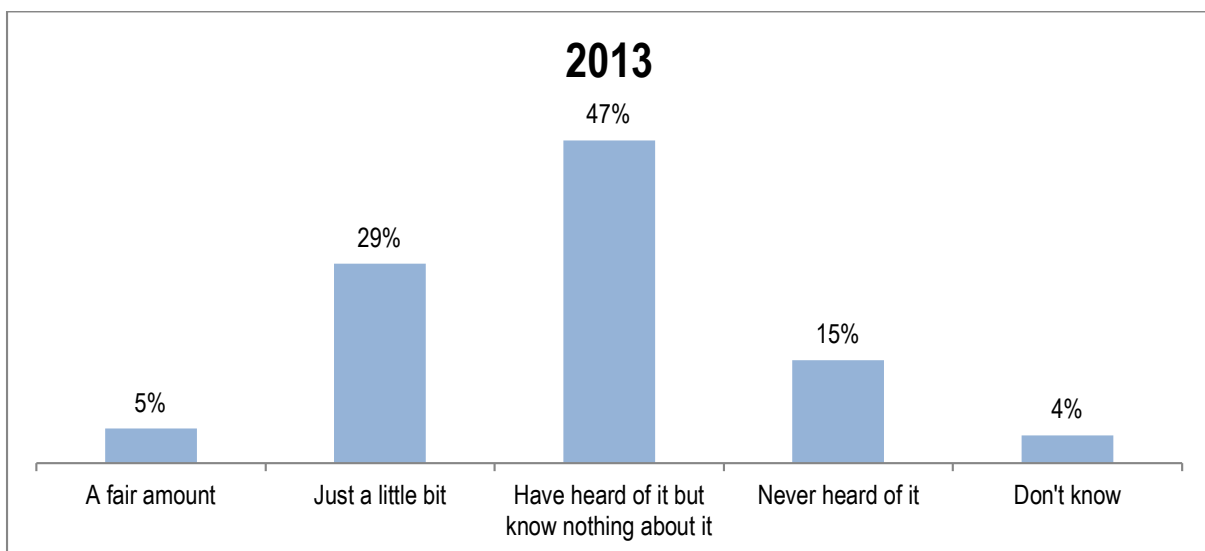
Q. The Arts Council is a public body which invests public money in arts and culture, and in artists and arts organisations, museums and libraries in England. How much, if anything, would you say that you know about the Arts Council?



Bases: All England adults 18+ (2014) n = 3,565; All England adults 18+ (2013) n = 1,778.

A similar question was asked by ICM Research in 2013 and is charted below for reference:

Q. The Arts Council is a public body which invests public money in arts and culture, and in artists and arts organisations, museums and libraries in England. How well, if at all, do you feel you know the Arts Council?

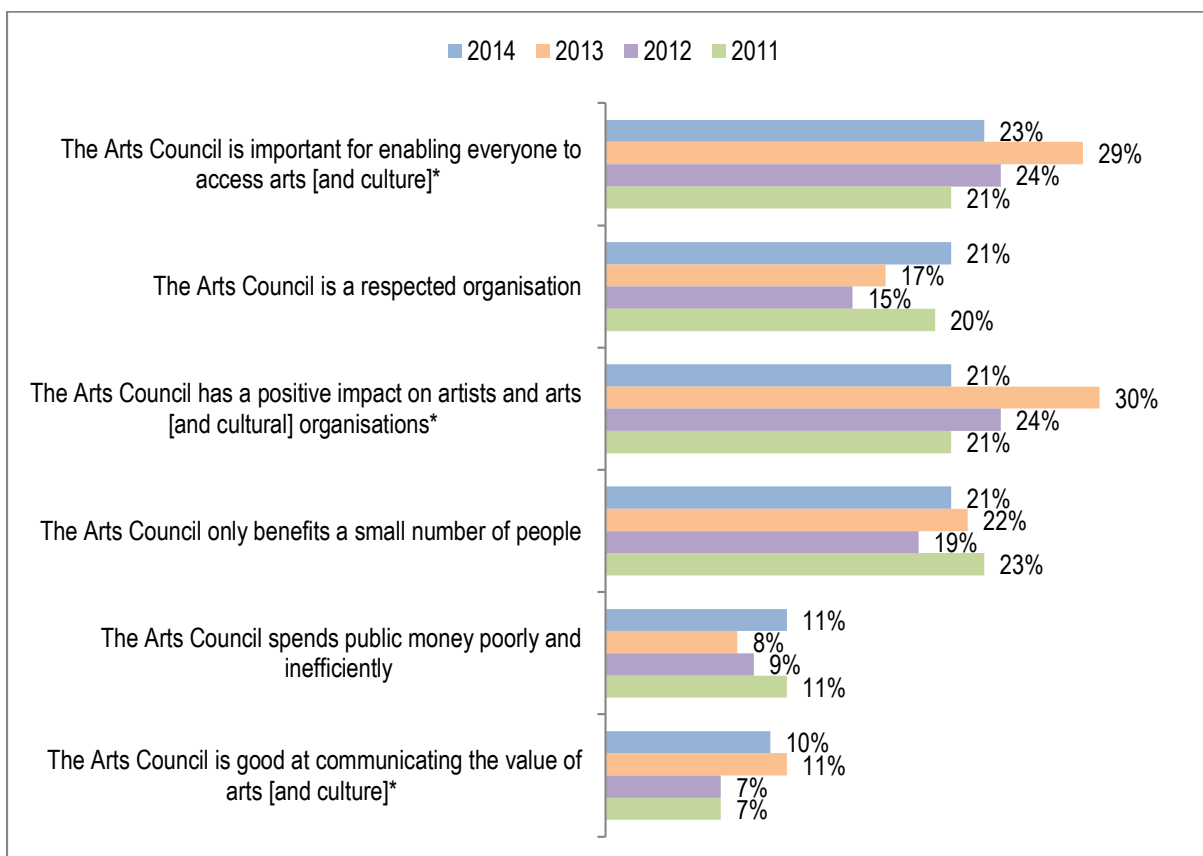


Bases: All England adults 18+ (2013) n = 1,778.

## Attitudes towards Arts Council England

The findings relating to Arts Council England’s role and performance are consistent with previous years. Nearly a quarter (23%) agree that Arts Council England is important for enabling everyone to access arts and culture, and 21% agree that it is a respected organisation. The proportion thinking that it is important for enabling everyone to access arts and culture rises to nearly a third (31%) among those aged 65 and over.

Q. *The Arts Council is a public body which invests public money in arts and culture, and in artists and arts organisations, museums and libraries in England. Which of the following statements do you agree with? [% agreeing]*



Bases: All England adults 18+ (2014) n = 3,565; All England adults 18+ (2013) n = 1,778; All England adults 18+ (2012) n = 1,750; All England adults 18+ (2011) n = 1,732.

\* Please note that there was a change in question wording between 2011 and 2012. In 2012 the words “and culture” were added to the statements.

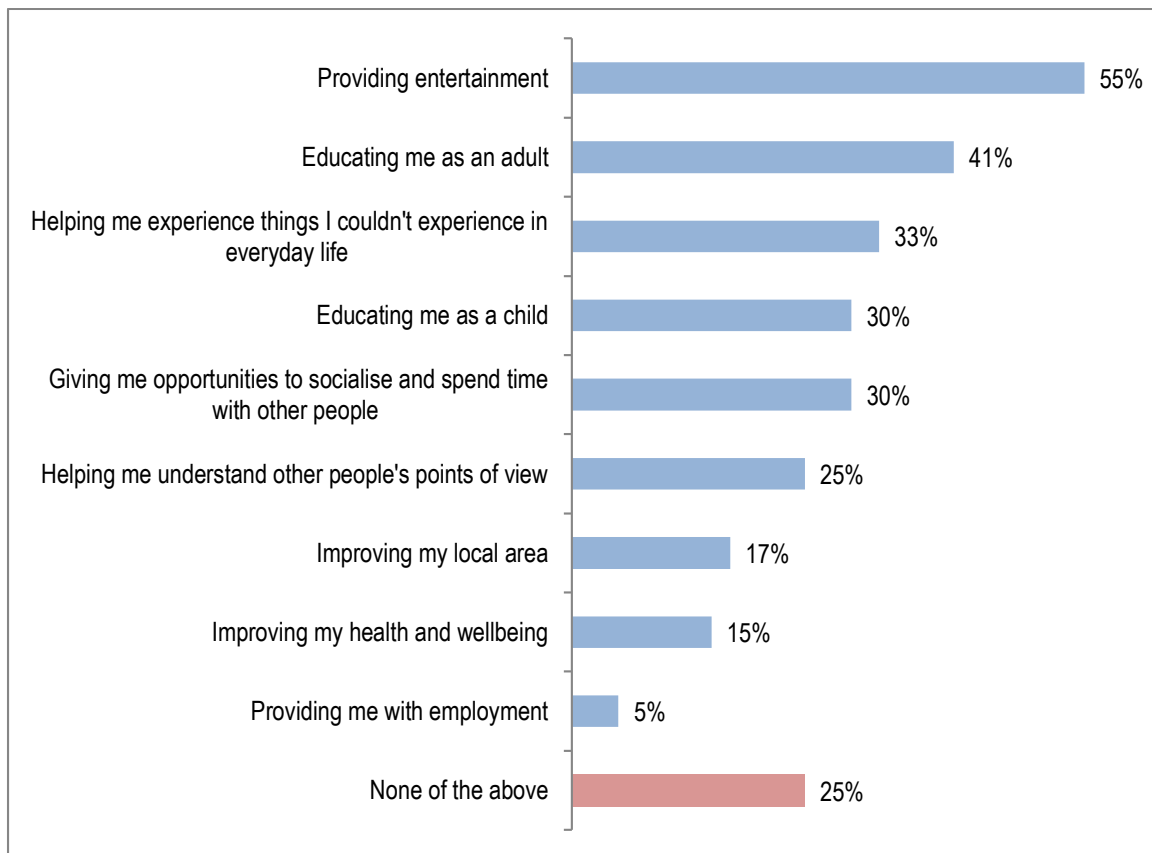
## FURTHER ANALYSIS

### Personal benefits of arts and culture

People perceive arts and culture to contribute to their personal lives in a range of ways, with a majority (55%) saying it provides entertainment. Around a quarter (25%) of the population feel that arts and culture does not bring them any personal benefits.

Less affluent C2DEs are much more likely to say that they have not experienced any personal benefits from arts and culture. 28% of C2s and over a third (36%) of DEs answer “None of the above” to the question.

*Q. Thinking about your personal life, in which of the following ways, if any, has arts and culture contributed?*

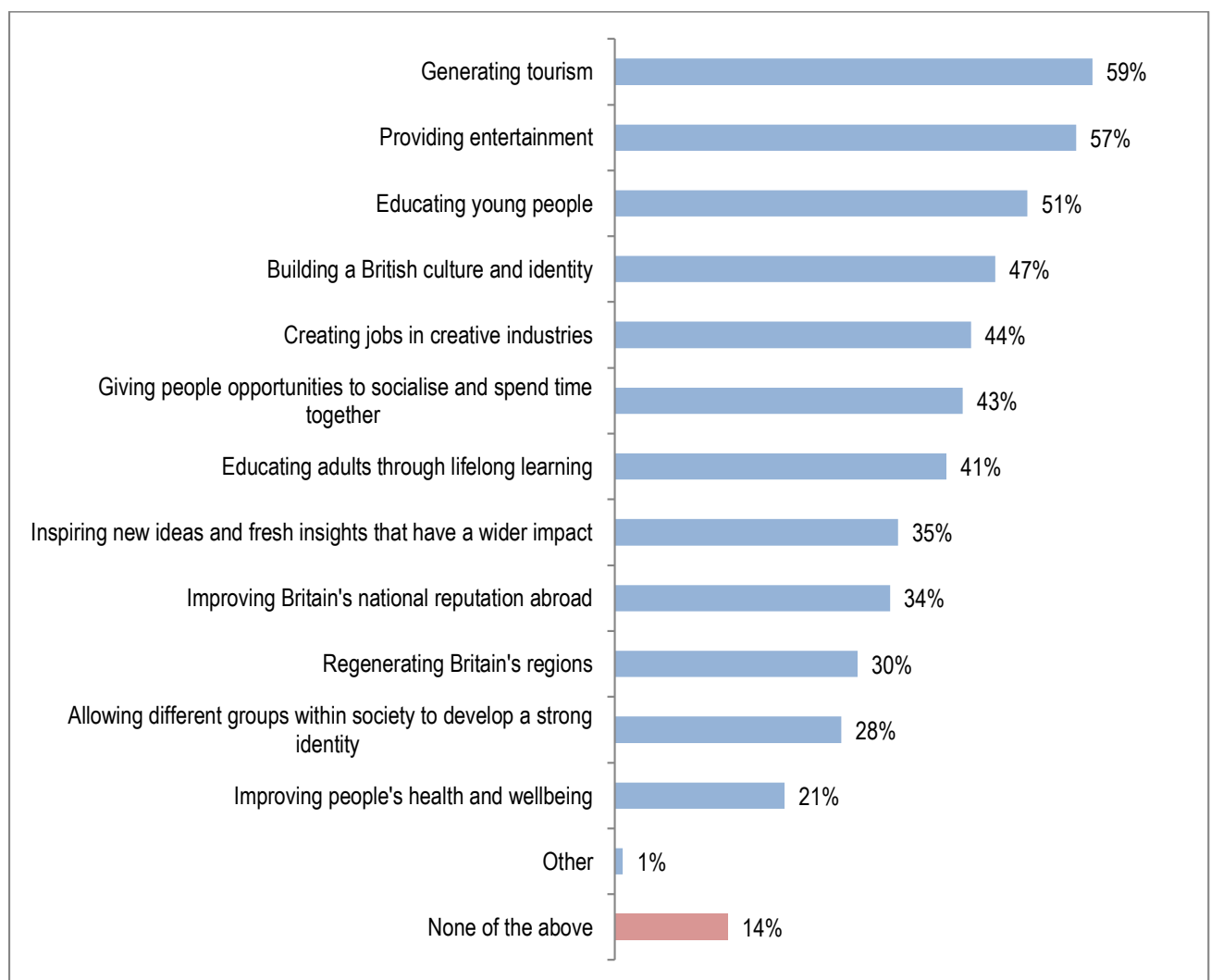


Bases: All England adults 18+ (2014) n = 3,565.

## Contribution of arts and culture to life in Britain

When asked how arts and culture has contributed to life in Britain, a majority of people choose generating tourism (59%), providing entertainment (57%), and educating young people (51%). Given the high levels of support for increased government expenditure on education, the latter is likely to be an important area of focus for Arts Council England. This contrasts strongly with the much smaller proportion of people (21%) who think arts and culture have improved people’s health and wellbeing. Large minorities recognise a range of other benefits.

Q. In which of the following ways, if any, has arts and culture contributed to life in Britain?



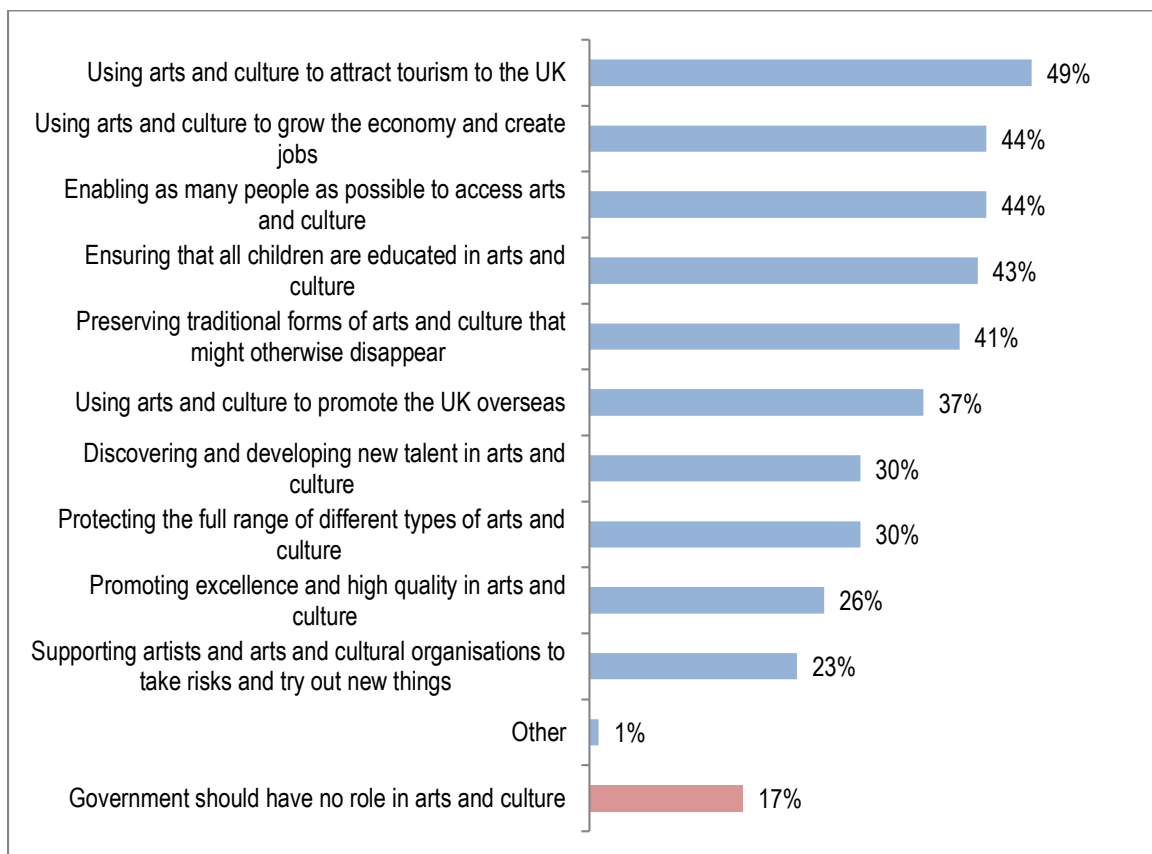
Bases: All England adults 18+ (2014) n = 3,565.



## Priorities for government investment in arts and culture

People think attracting tourism (49%), growing the economy (44%), and enabling as many people as possible to access arts and culture (44%) should be the priorities for government investment in arts and culture. Large minorities also choose children’s education (43%), preserving traditional artforms (41%) and using arts and culture to promote the UK overseas (37%).

*Q. Thinking about arts and culture, which, if any, of the following should be the most important goals for government investment? [Respondents able to select as many as apply]*



Bases: All England adults 18+ (2014) n = 3,565.

Comparing this with Arts Council England's five strategic goals, it is clear that Reach ("Enabling as many people as possible to access arts and culture") and Children & Young People ("Ensuring that all children are educated in arts and culture") are seen as the most critical. The public also place great value in a range of objectives that go beyond Arts Council England's core goals:

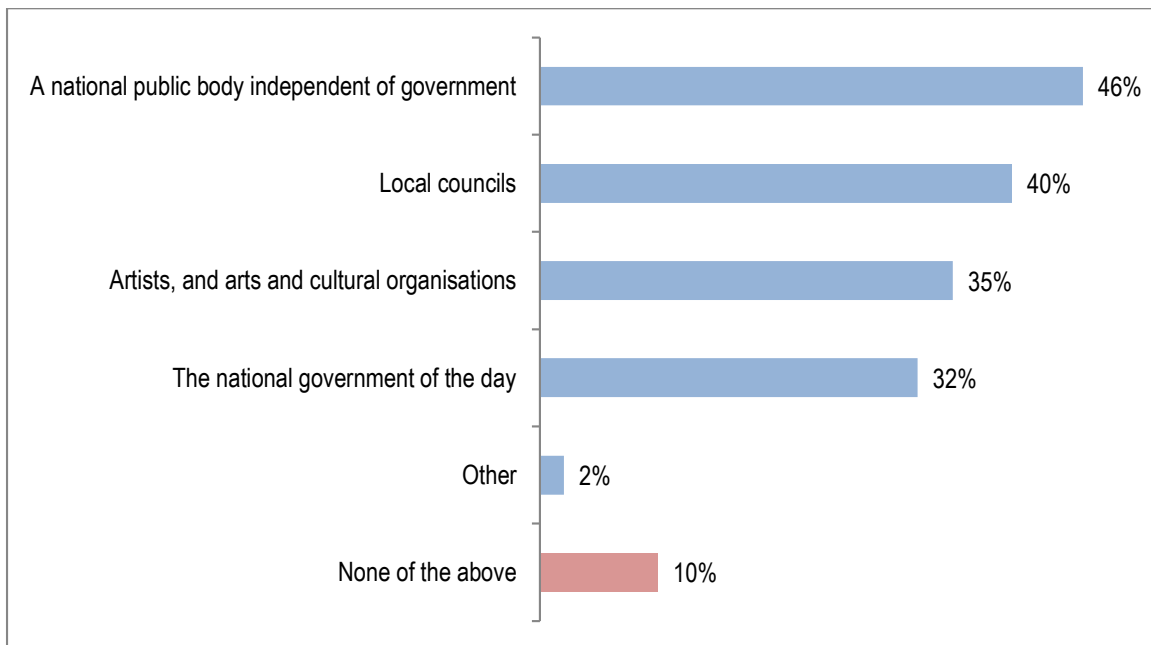
A grid of five colored boxes, each representing a strategic goal. Each box has a number in a circle at the top, followed by the text "Goal" and a horizontal line. Below the line is the goal text in all caps. The boxes are: 1. Dark blue: "EXCELLENCE IS THRIVING AND CELEBRATED IN THE ARTS, MUSEUMS AND LIBRARIES". 2. Light blue: "EVERYONE HAS THE OPPORTUNITY TO EXPERIENCE AND BE INSPIRED BY THE ARTS, MUSEUMS AND LIBRARIES". 3. Purple: "THE ARTS, MUSEUMS AND LIBRARIES ARE RESILIENT AND ENVIRONMENTALLY SUSTAINABLE". 4. Teal: "THE LEADERSHIP AND WORKFORCE IN THE ARTS, MUSEUMS AND LIBRARIES ARE DIVERSE AND APPROPRIATELY SKILLED". 5. Dark blue: "EVERY CHILD AND YOUNG PERSON HAS THE OPPORTUNITY TO EXPERIENCE THE RICHNESS OF THE ARTS, MUSEUMS AND LIBRARIES".

<p>Goal — <b>1</b></p> <hr/> <p><b>EXCELLENCE IS THRIVING AND CELEBRATED IN THE ARTS, MUSEUMS AND LIBRARIES</b></p>	<p>Goal — <b>2</b></p> <hr/> <p><b>EVERYONE HAS THE OPPORTUNITY TO EXPERIENCE AND BE INSPIRED BY THE ARTS, MUSEUMS AND LIBRARIES</b></p>	<p>Goal — <b>3</b></p> <hr/> <p><b>THE ARTS, MUSEUMS AND LIBRARIES ARE RESILIENT AND ENVIRONMENTALLY SUSTAINABLE</b></p>
<p>Goal — <b>4</b></p> <hr/> <p><b>THE LEADERSHIP AND WORKFORCE IN THE ARTS, MUSEUMS AND LIBRARIES ARE DIVERSE AND APPROPRIATELY SKILLED</b></p>	<p>Goal — <b>5</b></p> <hr/> <p><b>EVERY CHILD AND YOUNG PERSON HAS THE OPPORTUNITY TO EXPERIENCE THE RICHNESS OF THE ARTS, MUSEUMS AND LIBRARIES</b></p>	

## Responsibility for arts and culture spending

People are more likely to say that decisions about public spending on arts and culture should be made by a national public body independent of government (46%) than any other organisation. This rises to a majority (54%) among affluent ABs and over 65s.

*Q. Which, if any, of the following should be responsible for making decisions about public spending on arts and culture? [Respondents able to select as many as apply]*



Bases: All England adults 18+ (2014) n = 3,565.

***For more information please contact:***

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