



ARTS COUNCIL ENGLAND

PUBLIC SURVEYS

OCTOBER 2015



ABOUT COMRES

ComRes provides specialist research and insight into reputation management, public policy and communications. It is a founding member of the British Polling Council, and its staff are members of the UK Market Research Society, committing it to the highest standards of research practice.

ComRes won the 2014 Market Research Society Award for Public Policy / Social Research for its innovative research into online communications.

The consultancy also conducts regular public research for organisations including The Independent, ITV News, the BBC, and other media outlets, as well as a wide range of public sector and corporate clients.

For further information about ComRes, this research or any other research requirements please contact Katharine.Peacock@comres.co.uk.



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METHODOLOGY NOTE

ComRes conducted two online surveys for this report:

Part One: ComRes conducted a survey of 1,727 English adults aged 18+ online between 7th–9th October 2015. Data were weighted to be representative of all English adults by age, gender, region and socio-economic grade.

Part Two: ComRes conducted a survey of 1,778 English adults aged 18+ online between 14th–16th October 2015. Data were weighted to be representative of all English adults by age, gender, region and socio-economic grade.

PART ONE



EXECUTIVE SUMMARY



OVERVIEW

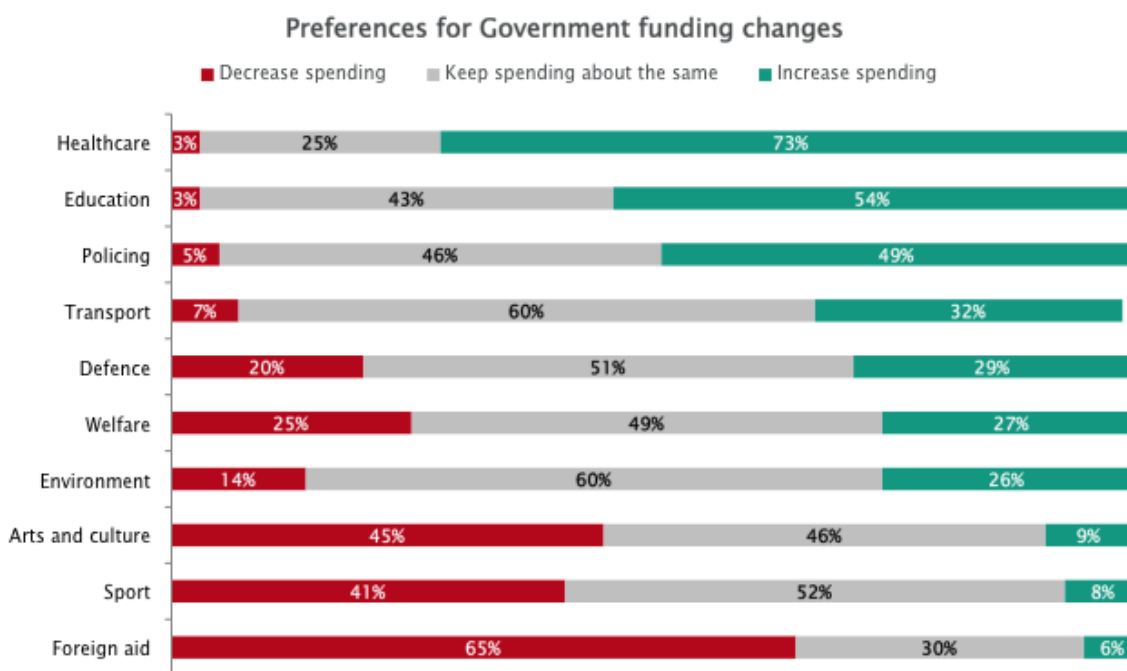
- There is little appetite among the public for the government to increase public spending on arts and culture. In line with the broader research we have conducted, frontline services are perceived to have priority over arts and culture among the public.
- Reported participation in arts and cultural activities has remained broadly consistent since 2014. The public are most likely to say that they attended a museum or gallery, followed by use of a public library and attended any creative, artistic, theatrical or musical events or activities, whereas a lower proportion report that they spent time actually doing any creative, artistic, theatrical or musical activities.
- As seen in 2014, adults are most likely to select ‘providing education’ as the way in which arts and culture has contributed to their personal lives.
- Providing entertainment is seen as the top way in which arts and culture contributes to life in Britain, second to its contribution to generating tourism, which was the top most-selected option in 2014.
- In terms of government investment, tourism is perceived to be the most important goal for government investment in arts and culture.
- The decline in support for funding of arts and culture seen between 2013–2014 is consistent this year, with little change in levels of support and opposition since 2014. In addition, levels of support for Lottery funding remain fairly consistent overall, and indeed since 2013.
- As in 2014, the areas of desired government support for arts and culture are libraries and museums, and most adults say that a national public body independent of government should be responsible for public spending on arts and culture.
- Awareness levels of the Arts Council are consistent with those reported in 2014; the most commonly held view of the Arts Council is that it is important for enabling everyone to access arts [and culture], of the statements tested. Going forward, most of the public agree that the Arts Council should make funding decisions based on how it can achieve an even spread of funding across the whole of England.
- Those who receive the additional information ‘in 2014, public money invested in arts and culture by Arts Council England made up 0.1% of all government spend’ are more likely than those who receive no additional information to say that they agree that arts and culture provides good value for money.

RESULTS IN DETAIL



ATTITUDES TO GOVERNMENT SPENDING ON ARTS AND CULTURE

Just one in eleven (9%) adults in England say that they think the UK government should increase spending on arts and culture. Post General Election 2015, frontline services such as Healthcare, Education and Policing are perceived to be the areas where English adults think that the UK government should increase spending.



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. Base (n=1727)

These findings are broadly in line with those from 2014; when two in five (40%) English adults said that the UK government should decrease spending on arts and culture, around half (53%) said that spending should be kept about the same, and just 7% said that spending on arts and culture should be increased.

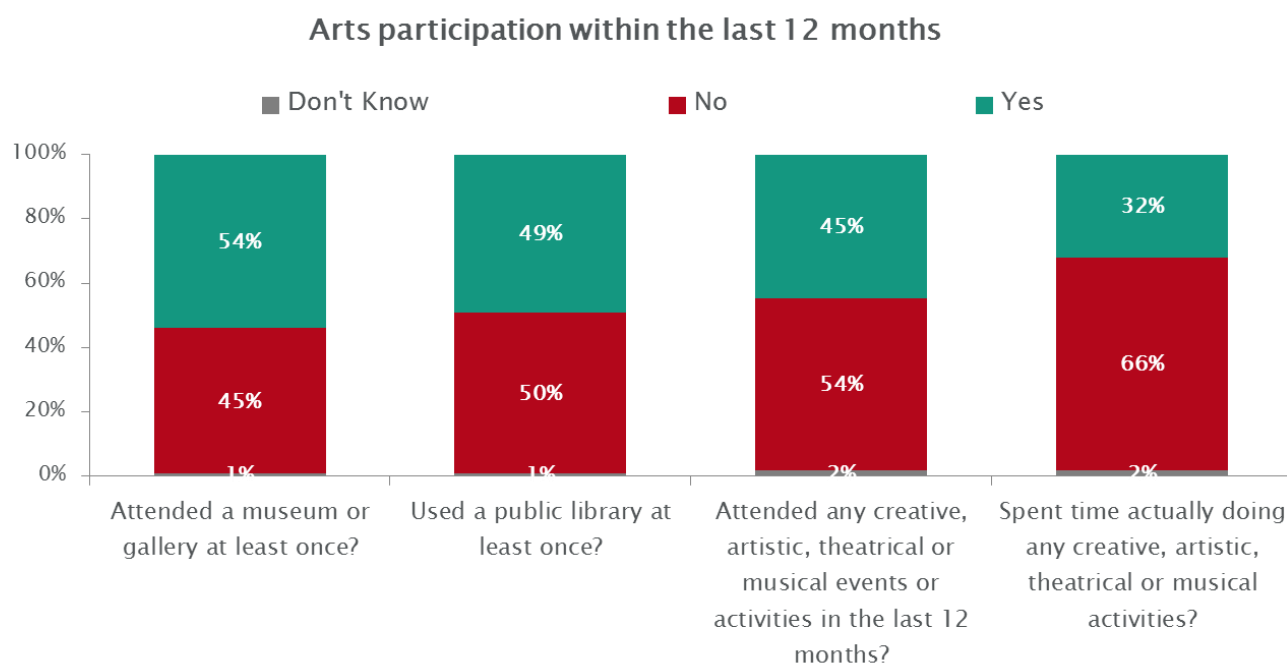
Older people are more likely than younger people to say that the UK government should decrease spending on arts and culture; more than half (54%) of those aged 65+ say that the government should decrease arts and culture spending, compared to just a quarter (26%) of those aged 18–24 who say the same. In addition, support for increasing government spend on arts and culture is more prevalent among 18–24s (18%) than those aged 65+ (6%).

There are differing levels of support for increasing government spending on arts and culture between socio-economic grades. One in ten (11%) of those from socio-economic grade AB C1 say that the government should increase spending, compared to 8% of those from grade C2, and 6% from grades DE.

Those who have participated in arts and culture in the last 12 months appear to be greater supporters of increasing spending; they are more likely (19%) to say that the government should increase spending in arts and culture than those who have used a public library (12%) or attended a museum or gallery (14%).

PARTICIPATION IN ARTS AND CULTURE IN THE LAST 12 MONTHS

Of the types of participation in arts and culture tested, English adults are most likely to say that they have attended a museum or gallery in the last 12 months (54%), used a public library (49%) or attended any creative, artistic, theatrical or musical events or activities (45%), than they are to say that they have spent time actually doing any creative, artistic, theatrical or musical activities (32%).



Q. During the last 12 months, have you: Base: (n=1727)

This shows no change in the public's participation in arts and culture since 2014, when attending a museum or gallery was the most selected form of participation in arts and culture (55%), followed by use of a public library (50%) and attending any creative, artistic, theatrical or musical events or activities (46%), whereas just 31% said that they spent time actually doing any creative, artistic, theatrical or musical activities. The decrease of just one percentage point for each of the types of arts and culture engagement indicates that overall, since 2014, participation in arts and culture has remained broadly consistent.

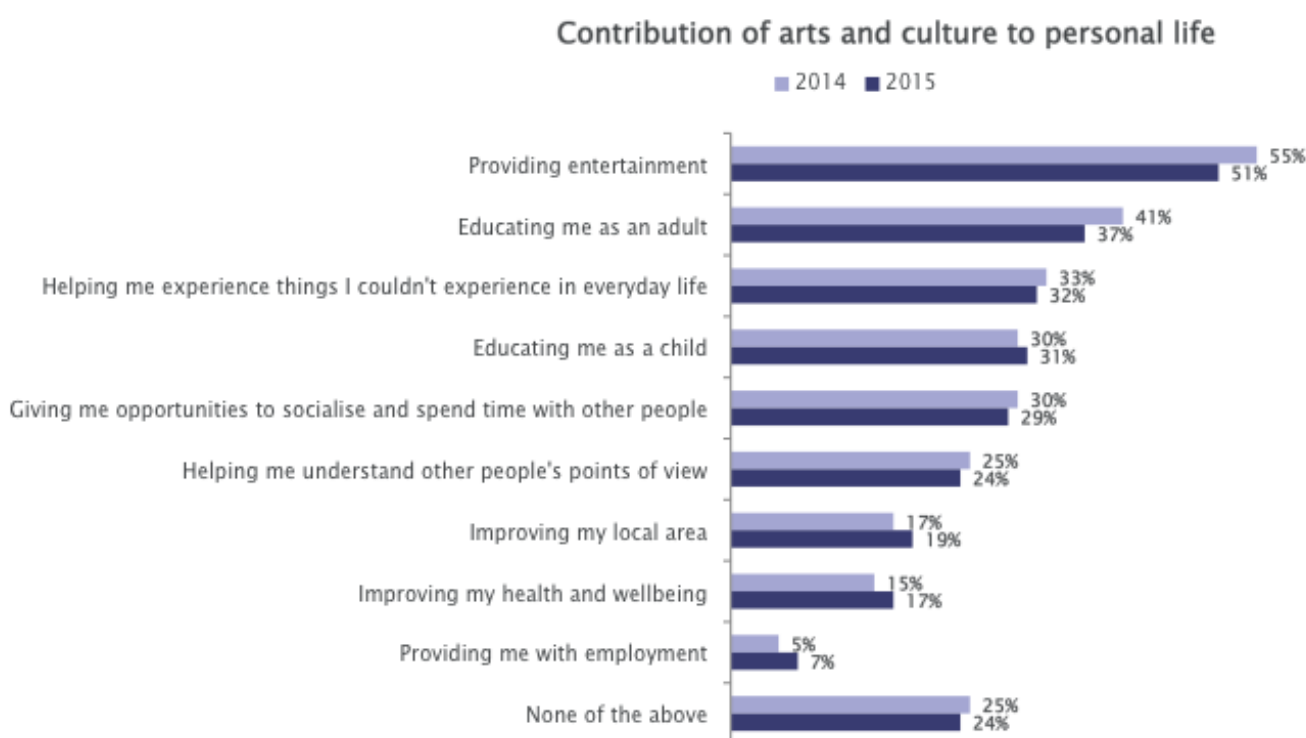
Participation rates are higher among younger than older people. Two thirds of those aged 18–24 say that they have attended a museum or gallery at least once (67%) or used a public library at least once (68%) decreasing to around half of those aged 65+ who say the same (52% and 47%, respectively). Higher reported participation among younger people in arts and culture continues with those who say that they have spent time actually doing any creative, artistic, theatrical or musical activities; 54% of those aged 18–24 say this, compared to just 23% of those aged 65+.

Those from socio-economic grades AB also report higher participation in arts and culture than those from grades DE, with the exception of use of public libraries. Those from socio-economic grades AB are twice as likely to say that they have attended any creative, artistic, theatrical or musical events or activities than those from grades DE (61% compared to 30%, respectively), and additionally are more likely to say that they have attended a museum or gallery at least once (68% of those from grades AB

compared to 41% of those from grades DE) or have spent time actually doing any creative, artistic, theatrical or musical activities (42% AB, compared to 25% DE). There is less differentiation in use of public libraries by socio-economic grade, with just a seven-percentage point difference between grades AB and DE (56% compared to 49%, respectively).

CONTRIBUTION OF ARTS AND CULTURE TO PERSONAL LIFE

Perceptions of the contribution of arts and culture to personal lives have remained broadly consistent since 2014, with providing entertainment and educating them as an adult coming top.

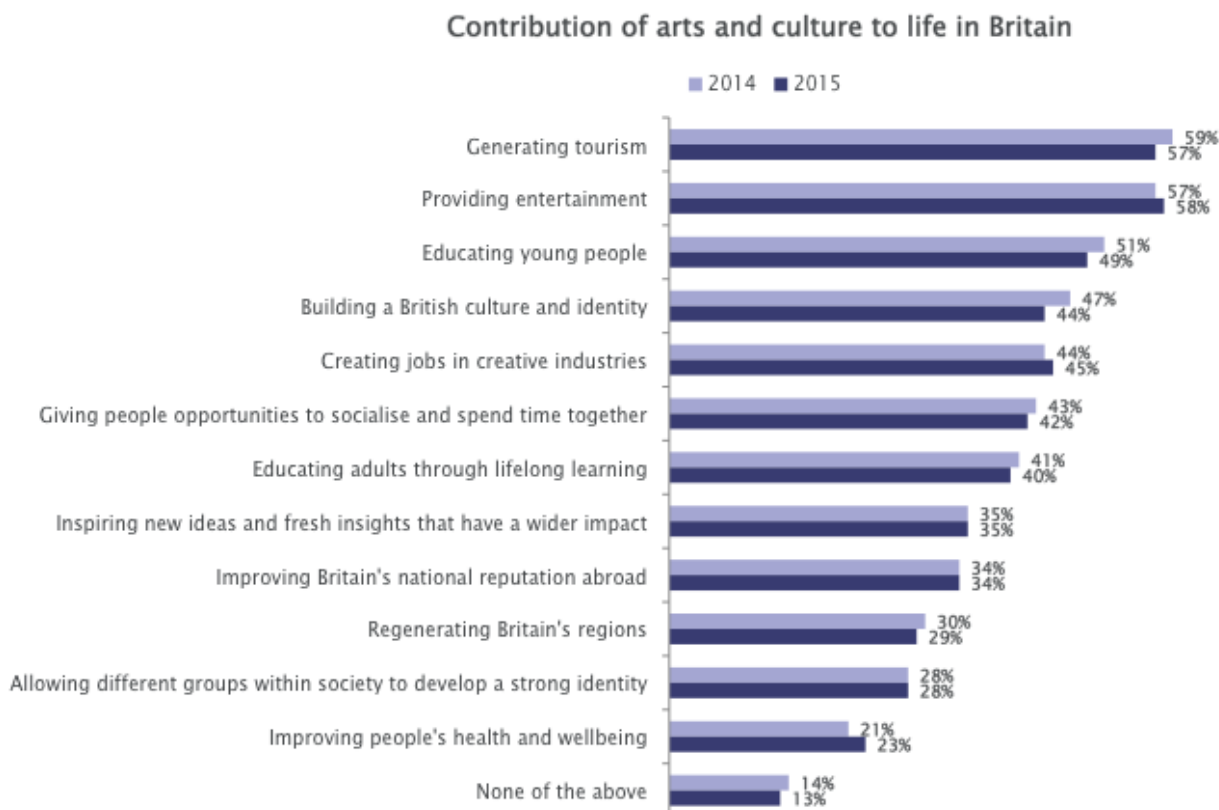


Q. Thinking about your personal life, in which of the following ways, if any, has arts and culture contributed? Base: (n=1727)

Around half (51%) of adults associate arts and culture with providing them with entertainment. Age and socio-economic grade continue to be key demographic factors affecting perceptions of arts and culture, with younger people and those from higher social grades perceiving arts and culture to have a broader range of personal benefits to them than just entertainment.

CONTRIBUTION OF ARTS AND CULTURE TO BRITAIN

Generating tourism and providing entertainment remain the most commonly named contributions of arts and culture to life in Britain.



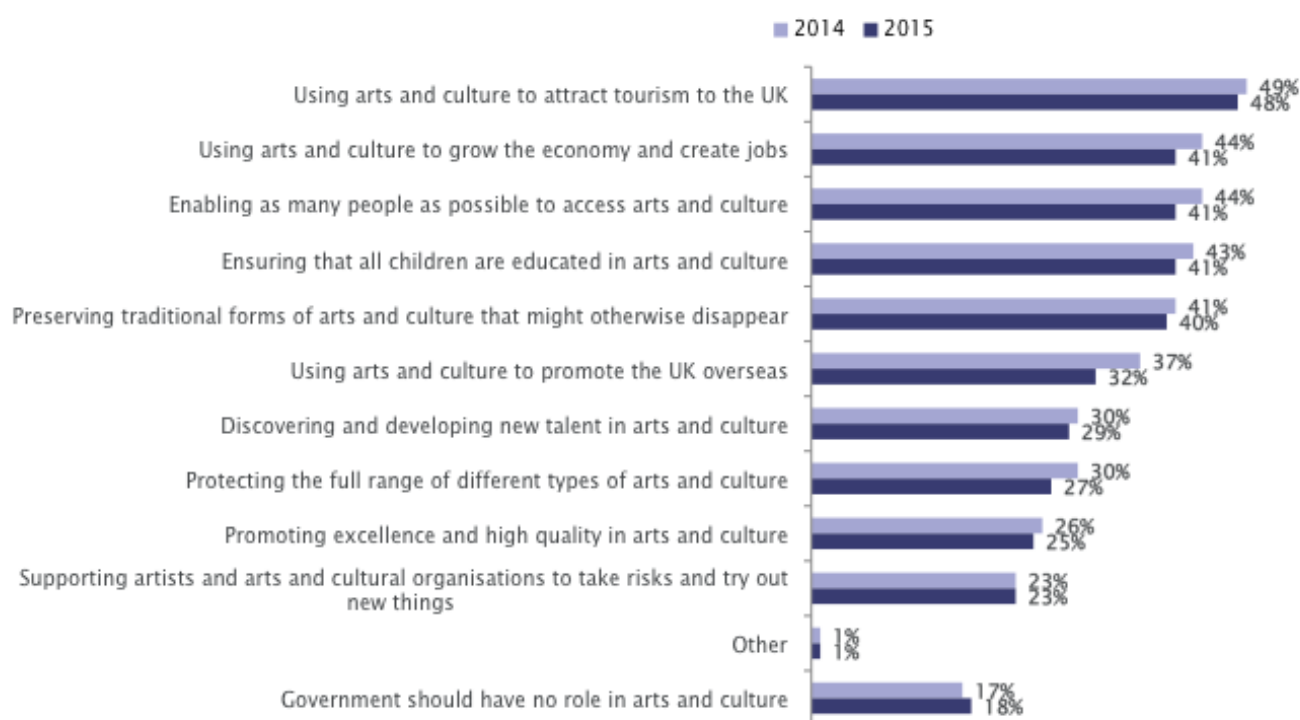
Q. In which of the following ways, if any, has arts and culture contributed to life in Britain? Please select as many or as few as you like. Base: (n=1727)

Conversely to the other findings, older people are more likely to say that arts and culture has contributed to life in Britain, by selecting any of the options tested, than younger people overall. This could indicate that although older people are less likely to have participated in arts and culture personally, and are less likely to feel the personal benefits of arts and culture, they have a broader sense of the benefits of arts and culture to the country as a whole.

PERCEPTIONS OF GOALS FOR GOVERNMENT INVESTMENT

Half (48%) of adults say that using arts and culture to attract tourism to the UK should be one of the most important goal for government investment, as was the case in 2014.

Most important goals for Government investment



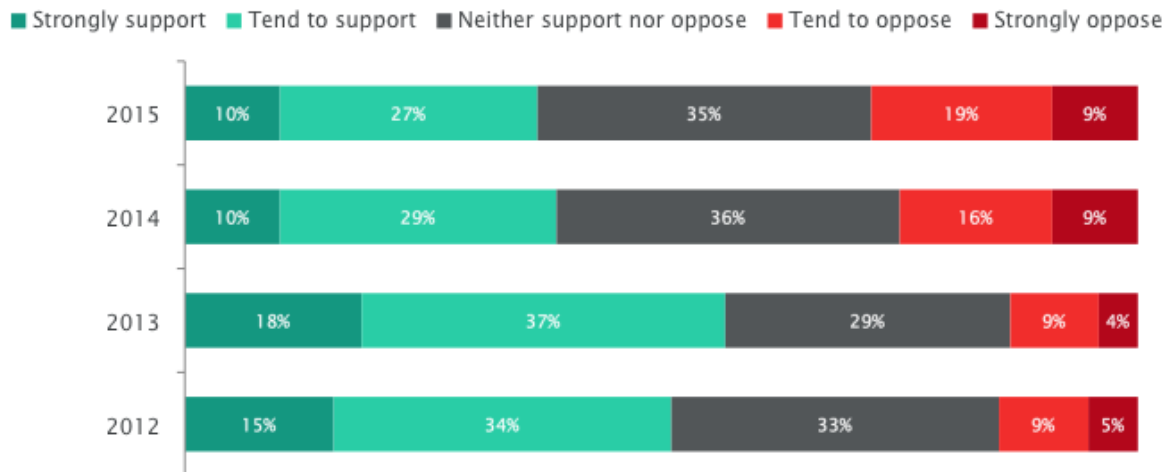
Q. Thinking about arts and culture, which, if any, of the following should be the most important goals for government investment? Base (n=1727)

Despite reporting less engagement with and fewer personal benefits of arts and culture to them personally, older people are just as likely, or more likely than their younger counterparts to perceive that the majority of the options tested should be goals for government investment in arts and culture. The exception to this is discovering new talent in arts and culture; more than two in five (43%) of those aged 18–24 say that this is an important goal for government investment in arts and culture, compared to a third (32%) of those aged 65+ who say the same. This finding would indicate that less personal engagement with arts and culture and fewer personal benefits felt as a result does not necessarily mean that older people do not support arts and culture; they tend to have a more rounded view of the benefits to Britain as a whole.

LEVELS OF SUPPORT OR OPPOSITION TO PUBLIC FUNDING OF ARTS AND CULTURE

Support for art and culture funding from taxes remains lower than in 2012/13 (37% support compared to 28% oppose).

Support for public funding for arts and culture



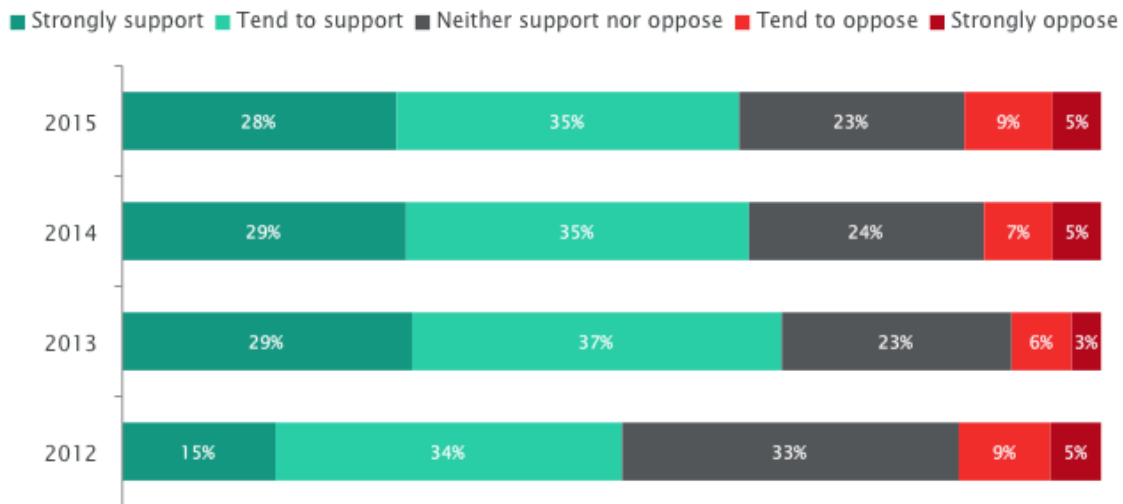
Q. As you may know, some of the arts in England are funded by the taxes we all pay. To what extent do you support or oppose this public funding of arts and culture? Base: (n=1727)

Men (34%) are more likely to oppose funding of arts and culture by taxes than women (22%), however women are more likely to select neither support nor oppose (39% compared to 32%). In addition, those from socio-economic grades AB are more likely to say that they support the funding of arts and culture in this way (44%) compared to those from grades DE (29%). Adults who say that there should be increased spending on arts and culture are more likely than those who say that it should be decreased to say that they support funding of arts and culture through taxes (72% compared to 14%).

LEVELS OF SUPPORT OR OPPOSITION TO LOTTERY FUNDING OF ARTS AND CULTURE

There is greater support from the public for Lottery funding of arts and culture (63%) than for government funding of arts and culture through taxes (37%). Support for Lottery funding of arts and culture has remained consistent since 2014 (64% in 2014 compared to 63% in 2015).

Support for National Lottery funding for arts and culture



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? Base: (n=1727)

As with funding through taxes, men are more likely to oppose Lottery funding than women (16% compared to 11%). Unlike support for arts and culture through taxes, younger people are more likely to say that they oppose Lottery funding than older people; 20% of those aged 18–24 say this, compared to 9% of those aged 65+. Those who say that arts and culture spending should be increased are more likely than those who say it should be decreased to support arts and culture spending through Lottery funding (72% compared to 58%).

PERCEPTIONS OF BENEFITS OF PUBLIC FUNDING OF ARTS AND CULTURE

English adults are more likely to say that they neither agree nor disagree that public funding of arts and culture benefits them, or their family and friends (39%) than they are to say that they agree (34%) or disagree (28%).

Benefits of public funding to family and friends

■ Strongly agree ■ Tend to agree ■ Neither agree nor disagree ■ Tend to disagree ■ Strongly disagree



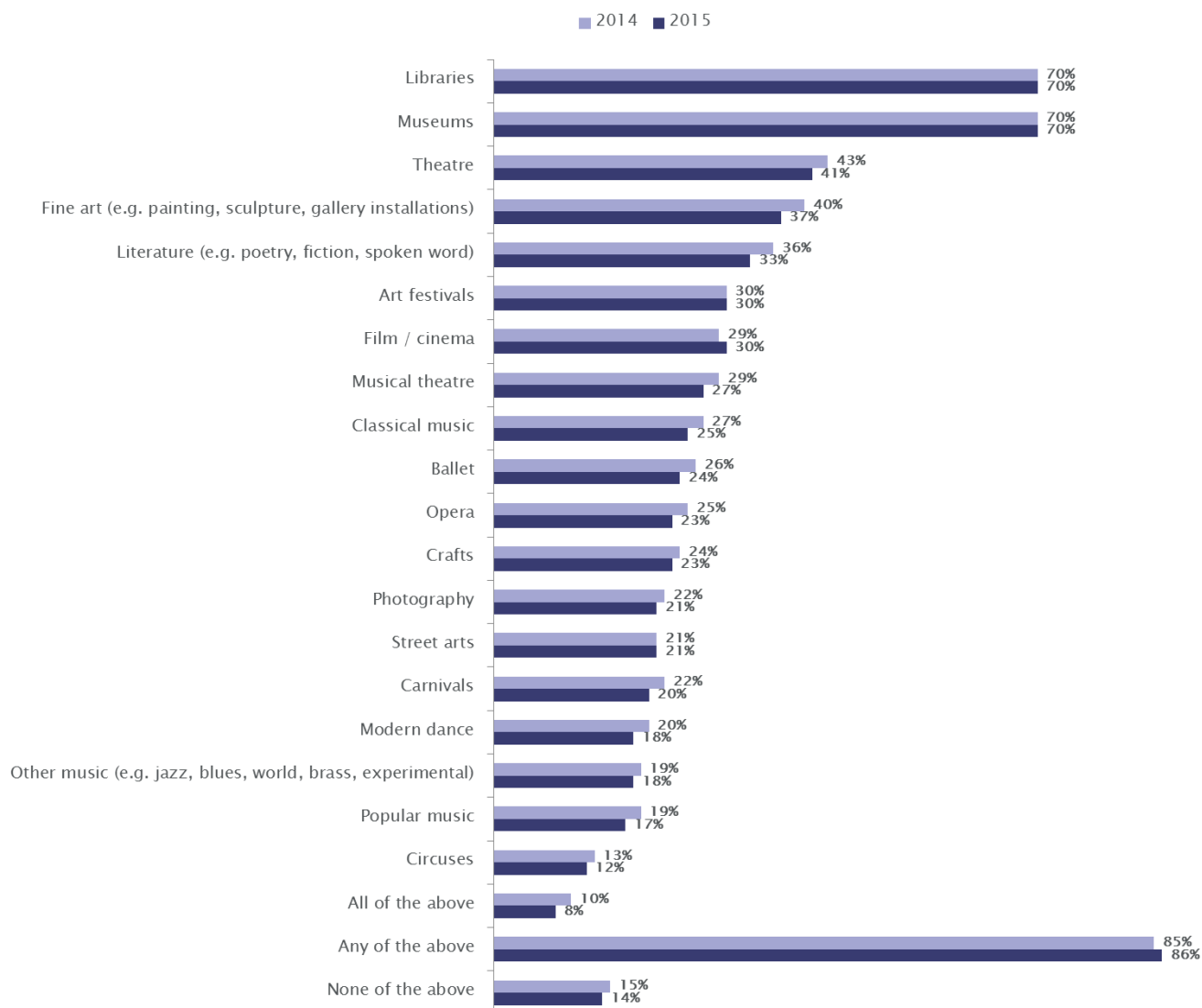
Q. To what extent do you agree or disagree that public funding of the arts and culture benefits you or your family and friends? Base: (n=1727)

Those from socio-economic grades AB are more likely than those from socio-economic grades DE to agree that public funding of arts and culture benefits them or their family and friends (44% AB, compared to 25% DE).

PERCEPTIONS OF FORMS OF ARTS AND CULTURE THAT SHOULD BE SUPPORTED FINANCIALLY BY THE GOVERNMENT

As in 2014, the public are most likely to say that the government should support libraries and museums (70% for each).

Desired Government support for arts and culture

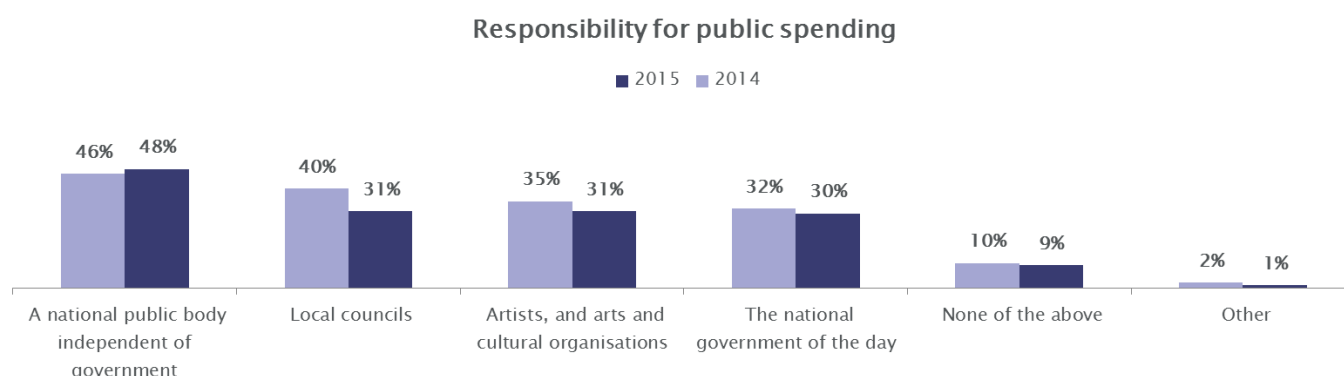


Overall, 86% of adults say that the government should support any of the options tested.

Support for arts and culture among younger people continues with their desire for government areas for support; those aged 18–24 are more likely than those aged 65+ to say that they think any of the areas should be supported by the government (94% compared to 88%). In line with previous findings, women are more likely to say that they think any of the options tested should be supported by the government than men (88% compared to 84%), and those from socio-economic grades AB more likely to say this than those from DE (89% AB, compared to 81% DE). Almost all (98%) of those who think that government spending on arts and culture should be increased say that the government should support any of the arts and culture types tested, compared to nine in ten (90%) of those who say spend on arts and culture should be kept the same, and four in five (79%) of those who say it should be decreased.

PERCEPTIONS OF RESPONSIBILITY FOR DECISION-MAKING ON PUBLIC SPENDING ON ARTS AND CULTURE

A national public body independent of government is the most popular choice to be responsible for making decisions about public spending on arts and culture. Support for local councils being responsible has fallen from 40% in 2014 to 31% in 2015.



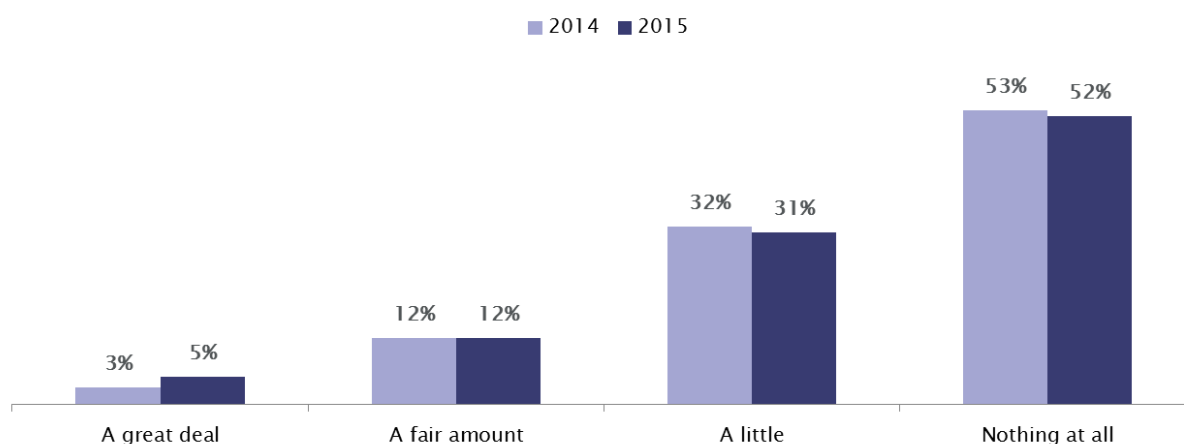
Q. Which, if any, of the following should be responsible for making decisions about public spending on arts and culture?
Base: (n=1727)

Preference for a national public body independent of government to be responsible are higher among those from socio-economic grades AB than those from DE (53% AB compared to 42% DE), however is broadly consistent across all other demographic groups.

AWARENESS OF THE ARTS COUNCIL

Half (52%) of English adults say that they know nothing at all about the Arts Council, while 5% of adults say that they know a great deal about the Arts Council. These findings show no significant change from 2014.

Extent of knowledge about the Arts Council



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? Base: (n=1727)

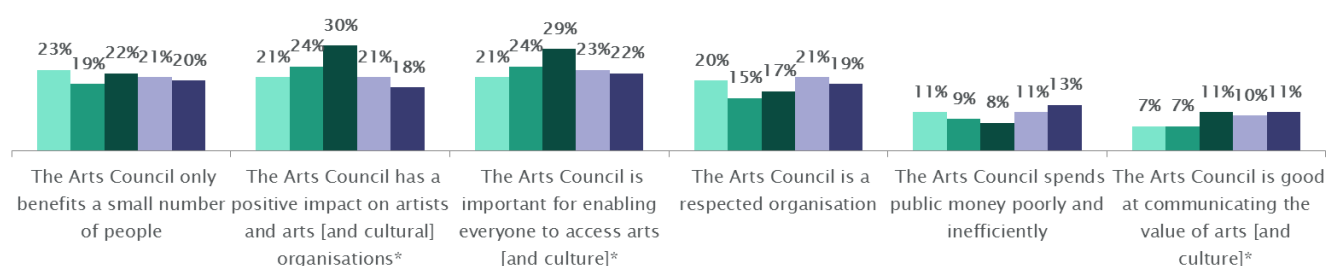
Younger people are more likely to say they know a great deal or a fair amount about the Arts Council; around two in five of those aged 18–24 say this (17% a great deal, 20% a fair amount), compared to 1% of those aged 65+ who say they know a great deal, and 7% of those aged 65+ who say they know a fair amount. Men (8%) are more likely to say that they know a great deal about the Arts Council than women (3%), despite overall women indicating support for government funding of different arts and culture types.

PERCEPTIONS OF THE ARTS COUNCIL

The most commonly held view of the Arts Council that it is important for enabling everyone to access arts [and culture], of the statements tested (22%).

Role of the Arts Council

■ 2015 ■ 2014 ■ 2013 ■ 2012 ■ 2011



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? Base: (n=1727)

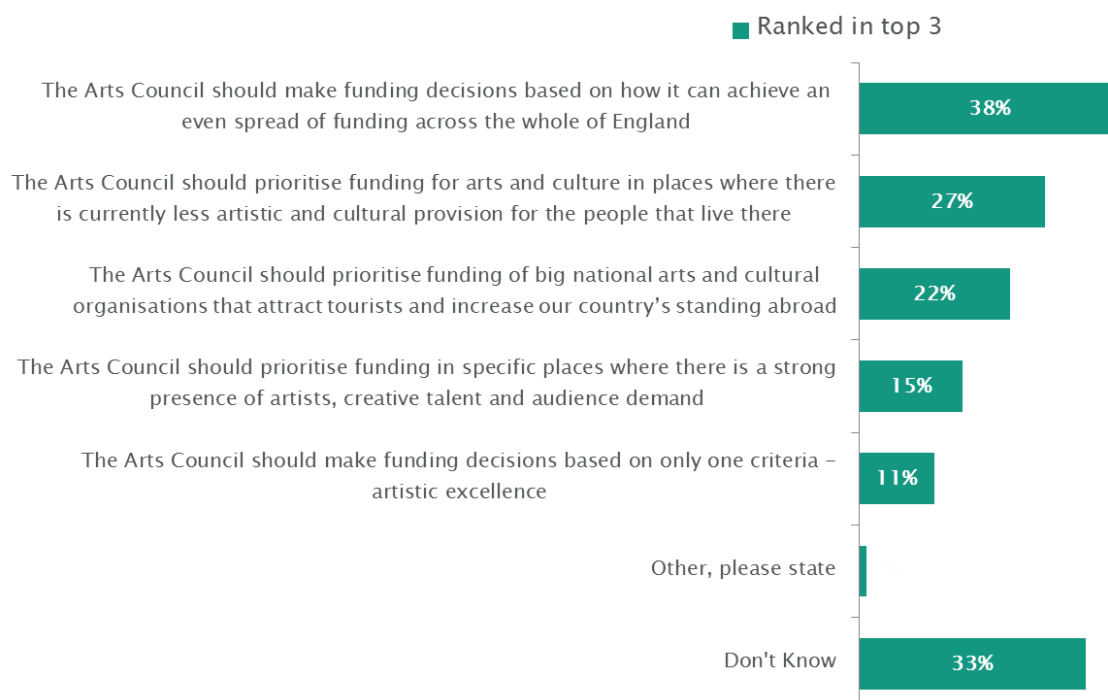
However, there are relatively low levels of agreement for each of the statements tested; the lowest levels of agreement are for 'the Arts Council is good at communicating the value of arts [and culture]' (11%). More than two in five (44%) say that they don't know or have no opinion for each of the statements tested. This indicates that there may be insufficient detailed knowledge about the Arts Council's beneficiaries, reputation, impact, expenditure and communications for the public to make a judgement.

The groups who are most likely to select 'don't know / no opinion' are women (49%, compared to 39% of men), between 25–54 (52% of those aged 25–34, 50% of those aged 35–44, 46% of those aged 45–54), from lower socio-economic grades (34% of those from socio-economic grades AB, compared to 50% of those from DE).

PERCEPTIONS OF ARTS COUNCIL INVESTMENT PRIORITIES

Around two in five (38%) adults select the statement 'the Arts Council should make funding decisions based on how it can achieve an even spread of funding across the whole of England' as the statement they most agree with.

Arts Council funding decisions



Q. The Arts Council has to think very carefully about how to invest its money wisely and fairly, in order to ensure that great art and culture is available for everyone in England.

Which of the following statements do you most agree with? Please select up to three options from the list below. Base: (n=1727)

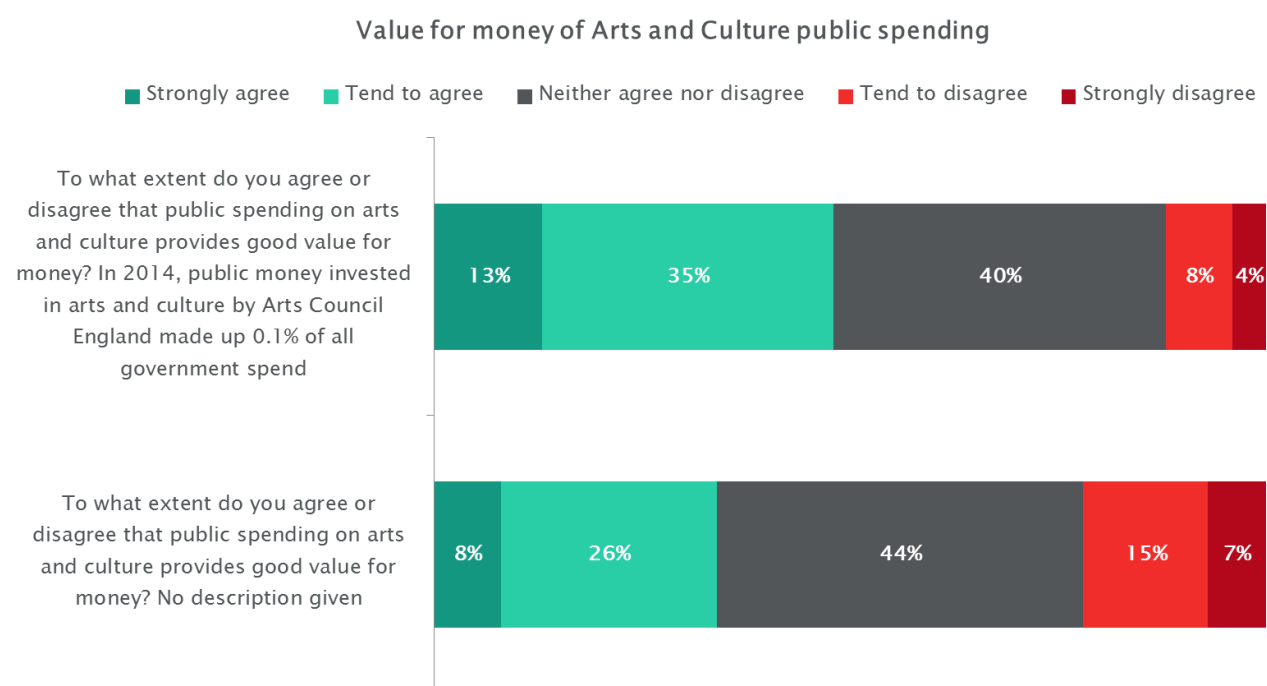
Around a quarter (27%) agree most that the Arts Council should prioritise funding for arts and culture in places where there is currently less artistic and cultural provision for the people that live there. Beyond the even distribution of funding across England, and provision in areas where there is limited access to arts and culture, the public would most like to see the prioritisation of funding national organisations that attract inbound international tourism to England (22%), followed by aspects relating to the artists

themselves (15% for areas where there is a strong presence of artists, creative talent and audience demand, 11% based on artistic excellence).

Older people are more likely than younger people to agree most that the Arts Council should make funding decisions based on how it can achieve an even spread of funding across the whole of England (51% of those aged 65+, compared to 34% of those aged 18–24), and those aged 65+ specifically are more likely than other age groups to say that the Arts Council should prioritise funding of big national arts and cultural organisations that attract tourists and increase our country's standing abroad (31% of those aged 65+, compared to around one in five of other age groups). Men are more likely than women to say that the Arts Council should make funding decisions based on only one criteria – artistic excellence (13% men, compared to 9% women).

PERCEPTIONS OF VALUE FOR MONEY OF ARTS AND CULTURE INVESTMENT

Respondents are more likely to agree that public spending on arts and culture provides good value for money if they are given the additional information that 'in 2014, public money invested in arts and culture by Arts Council England made up 0.1% of all government spend'.



Q. To what extent do you agree or disagree that public spending on arts and culture provides good value for money? Base: (n=889) for Sample A; Base: (n=838) for Sample B.

Among those who did receive the additional information, younger people aged 18–24 are more likely (61%) than those who are 55–64 or those aged 65+ (42% and 45%, respectively) to say that they agree that arts and culture provides value for money. The difference in age is additionally true in the sample who did not receive additional information; half (51%) of 18–24 year olds agree that arts and culture

provides value for money, compared to 29% of those aged 35–44, 26% of those aged 45–54, 27% of those aged 55–64 and 35% of those aged 65+. Of those who did not see the additional information, adults from socio-economic grades AB are more likely to agree that arts and culture provides value for money than those from socio-economic grades DE (40% AB, compared to 22% C2 and 28% DE), however this difference in opinion along socio-economic grades is as great when the public are presented with the additional information (52% AB compared to 39% DE).



SECTION TWO



EXECUTIVE SUMMARY



OVERVIEW

- English adults are most likely to say that they have attended a museum or gallery, followed by visiting a public library, then attending creative, artistic, theatrical or musical events or activities in the last 12 months. Fewer adults report actually doing any creative, artistic, theatrical or musical activities.
- Of the options tested, most adults say that they like arts and culture but prefer to spend their leisure time in other ways, and a similar proportion say that there are lots of opportunities to get involved with arts and culture if they want. Adults are less likely to say that they would like to have more to do with arts and culture or that arts and culture are an important part of their life. They are least likely to say that they are not interested in arts and culture, or that arts and culture are not for people like them.
- In light of a change of question order from 2014, support for public funding of arts and culture has returned to similarly high levels to 2013.
- Levels of support for Lottery funding of arts and culture has been impacted less by question order in 2014 than that of public funding, however the results in 2015 indicate that there has been an increase in support for Lottery funding of arts and culture among the public since 2013.

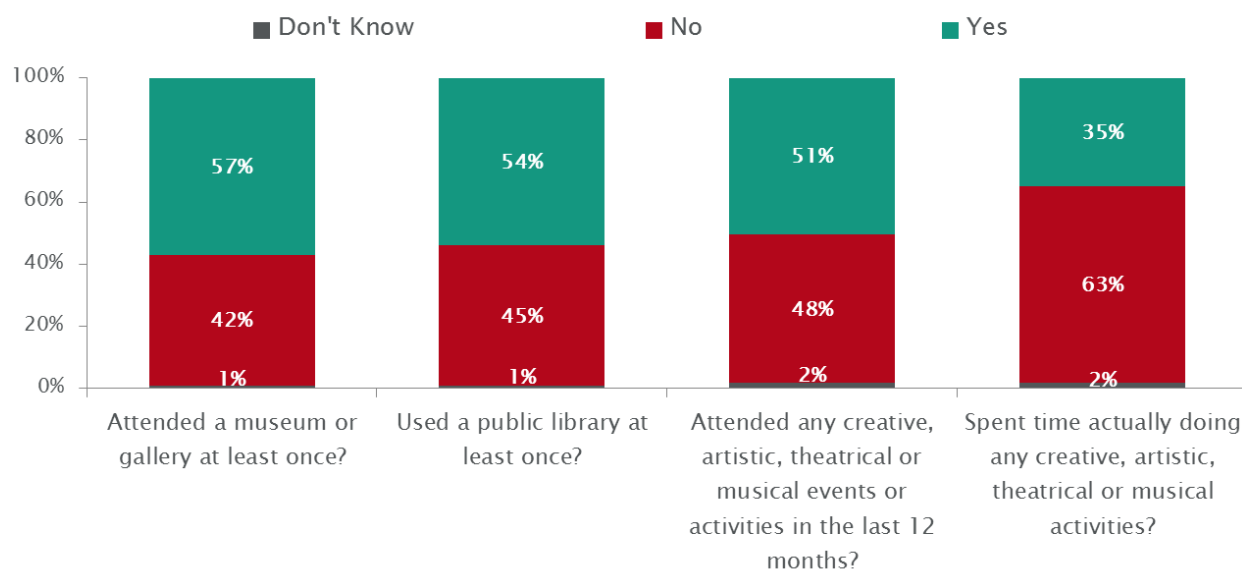
RESULTS IN DETAIL



PERSONAL PARTICIPATION IN ARTS AND CULTURE

Reported museum or gallery attendance (57%) is greater than that of public libraries (54%), creative, artistic, theatrical or musical events or activities (51%), or actually doing any creative, artistic, theatrical or musical activities (35%) among English adults.

Arts participation within the last 12 months



Q. During the last 12 months, have you: Base: (n=1778)

This aligns with the findings from 2014, where attending a museum or gallery was the most selected form of participation in arts and culture (55%), followed by use of a public library (50%) and attending any creative, artistic, theatrical or musical events or activities (46%), whereas just 31% said that they spent time actually doing any creative, artistic, theatrical or musical activities.

Younger people are more likely to say that they have engaged with arts and culture by any of the means tested than their older counterparts, with the exception of attending a museum or gallery, where results across age groups is broadly consistent.

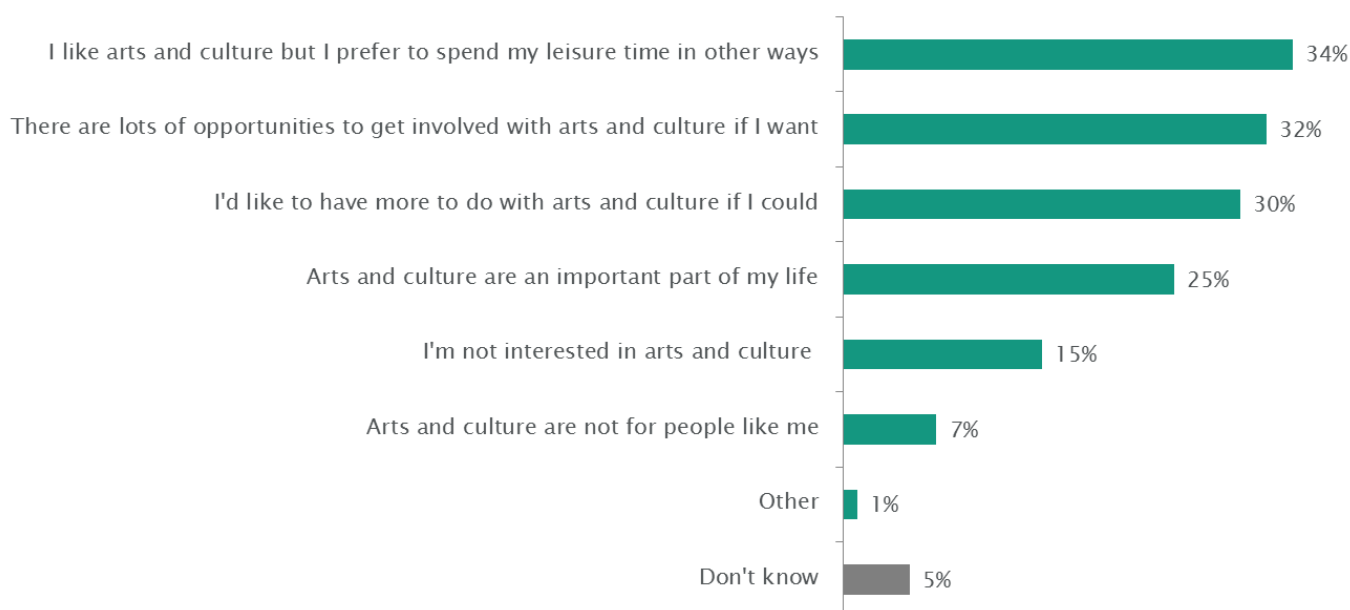
Those from socio-economic grades AB also report higher participation in arts and culture than those from grades DE, with the exception of use of public libraries. Those from socio-economic grades AB are more than twice as likely to say that they have attended any creative, artistic, theatrical or musical events or activities than those from grades DE (68% compared to 32%, respectively), and additionally are more likely to say that they have attended a museum or gallery at least once (72% of those from grades AB compared to 43% of those from grades DE). There is less differentiation in use of public libraries by socio-economic grade, with just a four-percentage point difference between grades AB and DE (57% compared to 53%, respectively).

ATTITUDES TOWARDS THE ARTS

A third (34%) of adults say that they like arts and culture but prefer to spend their leisure time in other ways, and a similar proportion (32%) say that there are lots of opportunities to get involved with arts and

culture if they want. Three in ten (30%) say that they would like to have more to do with arts and culture, and a quarter (25%) say that arts and culture are an important part of their life.

Involvement in arts and culture



Q. Which of the following statements do you agree with? You may select more than one. Base: (n=1778)

Men are more likely than women to say that they like arts and culture, but they prefer to spend their leisure time in other ways (39%, compared to 29% women), whereas women are more likely than men to say that they would like to have more to do with arts and culture if they could (34%, compared to 26% men).

Young people aged 18–24 and older people aged 65+ are more likely than other age groups to say that there are lots of opportunities to get involved in arts and culture if they want (42% 18–24s, and 37% of those aged 65+ compared to 27% of 25–34s, 31% of 35–44s, 29% of 45–54s and 26% of 55–64s). Those aged 18–24 are additionally more likely than any other age group to say that arts and culture are an important part of their life (36%, compared to 25% of people overall).

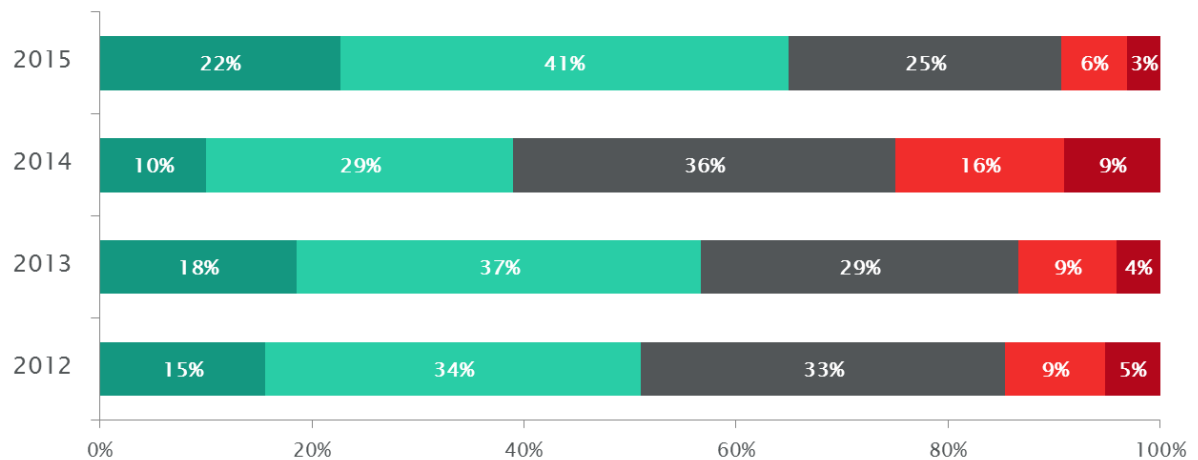
Interest in arts and culture is divided by socio-economic grade; those from grades AB are more likely than those from grades DE to say that arts and culture are an important part of their lives (35% compared to 15%), and those from grades DE more likely than those from grades AB to say that they are not interested in arts and culture (25% compared to 8%), or that arts and culture are not for people like them (10% compared to 6%).

ATTITUDES TOWARDS PUBLIC FUNDING OF THE ARTS

Two in five (63%) adults say that they support public funding of arts and culture through taxes. This more closely reflects the 2013 findings and suggest the dip in 2014 was related to question order in the survey.

Support for public funding for arts and culture

■ Strongly support ■ Tend to support ■ Neither support nor oppose ■ Tend to oppose ■ Strongly oppose



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? Base: (n=1778)

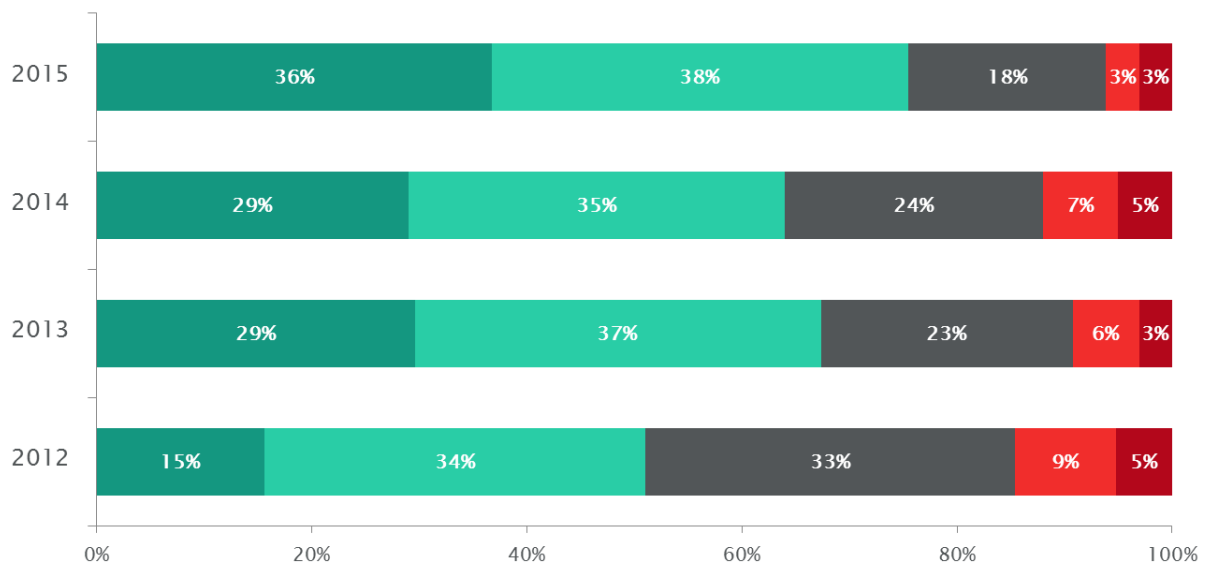
Men are more likely to say that they strongly support public funding of arts and culture than women (25% compared to 19%). This is in contrast to the 2014 results, where men were more likely than women to say that they strongly opposed public funding of arts and culture (12% compared to 6%).

ATTITUDES TOWARDS PUBLIC FUNDING OF THE ARTS

Levels of support for Lottery funding of arts and culture appears to have been impacted less by question order in 2014 than that of public funding, however the results in 2015 indicate that there has been an increase in support for Lottery funding of arts and culture among the public since 2013, with three quarters (74%) saying that they support this.

Support for National Lottery funding for arts and culture

■ Strongly support ■ Tend to support ■ Neither support nor oppose ■ Tend to oppose ■ Strongly oppose



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? Base: (n=1778)

However, as seen in demographic changes in support or opposition for public funding, men are no more likely than women to say that they support or oppose Lottery funding in 2015, whereas the 2014 results indicated that men were more likely to say that they oppose Lottery funding than women (14% compared to 10%). In addition, unlike in 2014, there are no significant differences in levels of support by age in the 2015 results, whereas older people were more likely to say that they support Lottery funding of arts and culture in 2014.

FOR MORE INFORMATION:

Holly Wicks

Senior Consultant

Holly.Wicks@comres.co.uk

+44 (0)20 7871 8645

Adam Ludlow

Senior Consultant

Adam.Ludlow@comres.co.uk

+44 (0)20 7871 86339





LONDON

Four Millbank
London
SW1P 3JA

T: +44 (0)20 7871 8660

F: +44 (0)20 7799 2391

E: info@comres.co.uk

BRUSSELS

Rond Point Schuman 6
Box5, 1040
Bruxelles

T: +32 (0)2 234 63 82

F: +32 (0)2 234 79 11

E: info@comres.eu.com

WWW.COMRES.CO.UK