



STAKEHOLDER FOCUS RESEARCH
STRAND TWO QUANTITATIVE SURVEY REPORT
2018

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INTRODUCTION



Introduction

As a public body, the Arts Council England aims to maintain effective relationships with both individuals and organisations in the arts and culture sector across England. Since 2009, the Arts Council has engaged sector stakeholders through their **Stakeholder Focus Research**, to understand and respond to perceptions of its performance and effectiveness in its various roles.

To continue this ongoing series of research, the Arts Council commissioned Qualia Analytics in 2017 to conduct two strands of the Stakeholder Focus Research with the arts and cultural sector throughout England. The first strand was conducted between October and November 2017 using *in-depth interviews* to engage 27 key opinion leaders with the context and reasons behind their views. The second strand was carried out between January and February 2018 using a *large-scale survey* to gain a broad perspective from 982 stakeholders. These strands help establish a contextualised understanding of stakeholders' perspectives and experiences with the Arts Council.

This report comprises findings from “Strand Two” of the 2017-2018 Stakeholder Focus Research. This research uses quantitative results from a *large-scale survey* to assess aggregate responses and patterns. Topics in this research include the ways in which stakeholders from arts and cultural organisations throughout England view the Arts Council, how the Arts Council addresses its stakeholders' needs and whether it is meeting stakeholder expectations.

Background and Objectives

The Arts Council England operates in a challenging policy and practice context. Staying engaged and responding to feedback from different stakeholders helps the Arts Council stay attentive to the shifting arts and culture landscape.

As part of its strategic research programme, the Arts Council has commissioned Stakeholder Focus Research since 2009. Findings from previous Stakeholder Focus Research, conducted in 2015, pointed towards opportunities for the Arts Council to improve its engagement and responsiveness to the arts and culture sector. The Arts Council has commissioned this research to understand how views of its performance have progressed. This research provides the Arts Council with a foundation for learning and growth as an organisation.

This report comprises the quantitative part of the 2017-18 Stakeholder Focus Research. This shows results from a large-scale online survey of stakeholders within the arts and cultural sector in England. This report is designed to reveal response patterns evident in the survey data.

Overall, the Stakeholder Focus Research provides the Arts Council and stakeholders with perspectives and insights about the following main topics:

- **Overall perceptions:** The degree of familiarity stakeholders have with the Arts Council, whether they view the Arts Council favourably or unfavourably and whether they would speak highly of the Arts Council if asked or without being asked (*Section 1*). Moreover, stakeholders' general impressions of the Arts Council are compared to its ideal characteristics (*Section 1.4*).
- **Reputational drivers for the Arts Council:** How stakeholders perceive the Arts Council's performance and impact (*Sections 2.1 and 2.3*), and how stakeholders view the Arts Council's vision and role (*Sections 2.2 and 2.4*), underpinned by its ten-year strategy, "Great art and culture for everyone".
- **Investment and funding processes:** How stakeholders view changes to the NPO investment programme, application processes and funding decision-making, as well as related issues for other funding programmes (*Section 3*).
- **Equality, diversity and the Creative Case:** How stakeholders view the Creative Case for Diversity and wider equality and diversity agenda, and perceptions of the relationship between the Arts Council's strategy on equality and diversity and its investment decisions (*Section 3*).
- **Working relationships:** How stakeholders view their working relationship between them or their organisation and the Arts Council (*Section 4*).

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- **Communication and clarity:** Stakeholders' perspectives on messaging, communication channels, meetings, contact with relationship managers and transparency of decision-making (*Section 5*).
 - **Future priorities:** The areas that stakeholders identify as pivotal for the Arts Council to maintain or improve its performance going forward. (*Section 6*).

Findings in this 2018 round of stakeholder research are compared to the results from previous years, especially the most recent in 2015, in order to evaluate progress.

METHODS

Methods

This section describes how Strand Two of the 2018 Stakeholder Focus Research was conducted.

Introduction

Qualia Analytics conducted a large-scale quantitative online survey of stakeholders within the arts and culture sector on behalf of Arts Council England. In this context, Arts Council England stakeholders are defined as individuals in key roles as affiliated representatives of an organisation or unaffiliated individuals (e.g., artists) from across the arts and culture sector in England.

This methods section describes the process of gathering and analysing the data that are presented in this report, as well as the sampling distribution and quality assurance mechanisms that were employed.

Procedure

The Arts Council compiled a sample from its databases of stakeholders from the arts and culture sectors. This initial sample includes organisations that receive regular funding from the Arts Council, individual artists that receive Grants for the Arts, organisations and individual artists that have applied for funding, central and local government staff with responsibility for arts and culture, and key representatives from the libraries sector and national and regional agencies.

To match the process in previous years, a limit of two members and two officers per local authority was imposed for inclusion in the sample. In addition, companies and organisations were limited to one contact to ensure that no organisation was over-represented in the sample. Once duplicate entries and those with incorrect email addresses were removed, the Arts Council provided a sample of 2,823 usable contacts. A warm-up email, signed by the Arts Council Chief Executive was sent to all contacts to confirm the authenticity of the research and stress its importance. Following this initial contact message, an invitation email containing the access link to the stakeholder survey was sent to all contacts in the sample. Reminder emails were sent at weekly intervals during the data collection period to those who had either not started, nor completed, the survey.

Sampling

The research was carried out during January and February 2018. In total, 2,823 affiliated ($n = 2421$) and unaffiliated ($n = 402$) individuals, either representing an organisation ($n = 2081$) or artists from across the arts and culture sector ($n = 741$), were contacted by email. After accounting for bounce-backs received from old or

incorrect email addresses, a remaining 2,719 emails were active. In total, a sample of 982 stakeholders provided responses, from 822 unique organisations. This is an adjusted response rate of 36% (2015: -2%) from individual stakeholders and 40% from affiliated unique responses (e.g., 1 representative = 1 organisation).

The following table includes the total sample, number of completed responses and response rates by stakeholder category including 2015 proportions in brackets for comparison (see *Table S1*).

Table S1. Stakeholder Focus Research survey response rates by stakeholder category

Stakeholder group	2018 sample (2015)	2018 responses (2015)	2018 adjusted response rate (2015)	2018 response distribution by category (2015)
Arts organisation ¹	1398 (1351)	636 (626)	46% (46%)	65% (60%)
Arts individual	400 (397)	134 (163)	34% (41%)	14% (16%)
CYP	135 (167)	69 (69)	51% (41%)	7% (6%)
Local Authority	544 (464)	62 (82)	11% (18%)	6% (8%)
Libraries (non-NPO)	151 (184)	43 (45)	28% (24%)	4% (4%)
Museums (non-NPO)	130 (129)	26 (49)	20% (38%)	3% (4%)
Infrastructure ²	36 (50)	8 (15)	22% (30%)	1% (1%)
Economic Development ³	29 (29)	4 (2)	13.8% (7%)	0%
Total	2823 (2771)	982 (1051)	35% (38%)	100%

¹ Arts organisation refers to **National Portfolio Organisations (NPO) and Grants for the Arts (GFTA) stakeholders**

² Infrastructure refers to **national associations relating to arts and culture, or regional heritage organisations**

³ Economic development stakeholders include respondents from organisations such as **Local Enterprise Partnerships**

The following table shows the distribution of the sample by Arts Council-defined geographical area (*Table S2*).

Table S2. Geographical area of participating stakeholders

Number / Percentage		N		%	
		2018	2015	2018	2015
Category	London	255	296	26	28
	South West	146	119	15	11
	Yorkshire (and the Humber)	113	104	12	10
	North West	112	119	11	11
	South East	83	123	8	12
	East of England	70	77	7	7
	West Midlands	70	69	7	7
	East Midlands	60	53	6	5
	North East	51	61	5	6
	National	17	30	2	3
	Wales	5	-	*	-
	Total	982	1051	99	100

The table above shows that the 2018 sample is slightly more widely dispersed around England than the previous survey sample.

The following table shows the distribution of respondents by size of organisation (*Table S3*).

Table S3. Size of respondents' organisations

Number / Percentage		N	%
Category	Band 1	323	42
	Band 2	83	11
	Band 3	23	3
	GFTA up to £15,000	286	37
	GFTA over £15,000	55	7
	Total	770	100%

The following table shows the distribution of respondents' funding status, showing greater participation from funded organisations in the present survey compared to other categories (*Table S4*).

Table S4. Funding status of respondents

Number / Percentage		N	%
Category	Successful	319	42
	Offered	186	24
	Unsuccessful	155	20
	Rejected	110	14
	Total	770	100%

The most represented art forms in the present sample are theatre and visual arts, as can be seen in the table below (*Table S5*).

Table S5. Distribution of respondents' art forms

Number / Percentage		N	%
Category	Theatre	177	23%
	Visual arts	150	19%
	Combined arts	128	17%
	Music	108	14%
	Not discipline specified	69	9%
	Literature	59	8%
	Dance	40	5%
	Museums	26	3%
	Libraries	6	1%
	Total	763	100%

The 2015 Stakeholder Focus Research reporting does not include the details to compare with the present sample on the categories covered in Tables S3-S5. However, where comparison data are available, there is a broadly similar profile of respondents in the 2015 and 2018 surveys.

Presentation and interpretation of data

Findings in the report are presented using data that are *unweighted*. This aligns with the approaches taken in previous iterations of the stakeholder research.

Where sample sizes are small, findings should be treated with caution. For instance, the sample sizes for Libraries stakeholders (43) and non-NPO museum stakeholders (26) fall under 50 respondents, but they have been included in the report (with categories n = 25 or more included in the reporting, and smaller categories excluded). Infrastructure stakeholders (8) and Economic Development stakeholders (4) have not

been included in the report analyses as separate categories due to their very small base sample size.

Where total percentages add to less than 100, this may be due to either rounding of decimals, the exclusion of “don’t know” response categories, or questions that have multiple response options, such as ‘tick all that apply’ questions. Throughout the report an asterisk (*) denotes any value of less than half per cent (< 0.5%) but greater than zero.

In the report and accompanying computer tables, reference is made to “net” figures. This represents the balance of opinion on attitudinal questions and provides a particularly useful means of comparing the results for a number of variables.

This survey deals with stakeholders’ perceptions at the time the survey was conducted, rather than objective facts about the Arts Council. This report does not include any ‘fact checking’ of stakeholders’ perceptions about the Arts Council and its work.

Throughout the report, differences across stakeholder categories are highlighted when statistically significant, and the specific statistical test details are shown in a footnote. However, analyses of differences between 2015 and 2018 results are simply at the level of comparing percentage points, because the raw data from previous iterations of the survey are not available to be able to run inferential statistical comparisons.

Acknowledgements

Qualia Analytics would like to thank the Arts Council’s Policy & Research and Advocacy & Communications teams for their help and support in developing this project. We are particularly grateful to the 982 stakeholders who participated in this research.

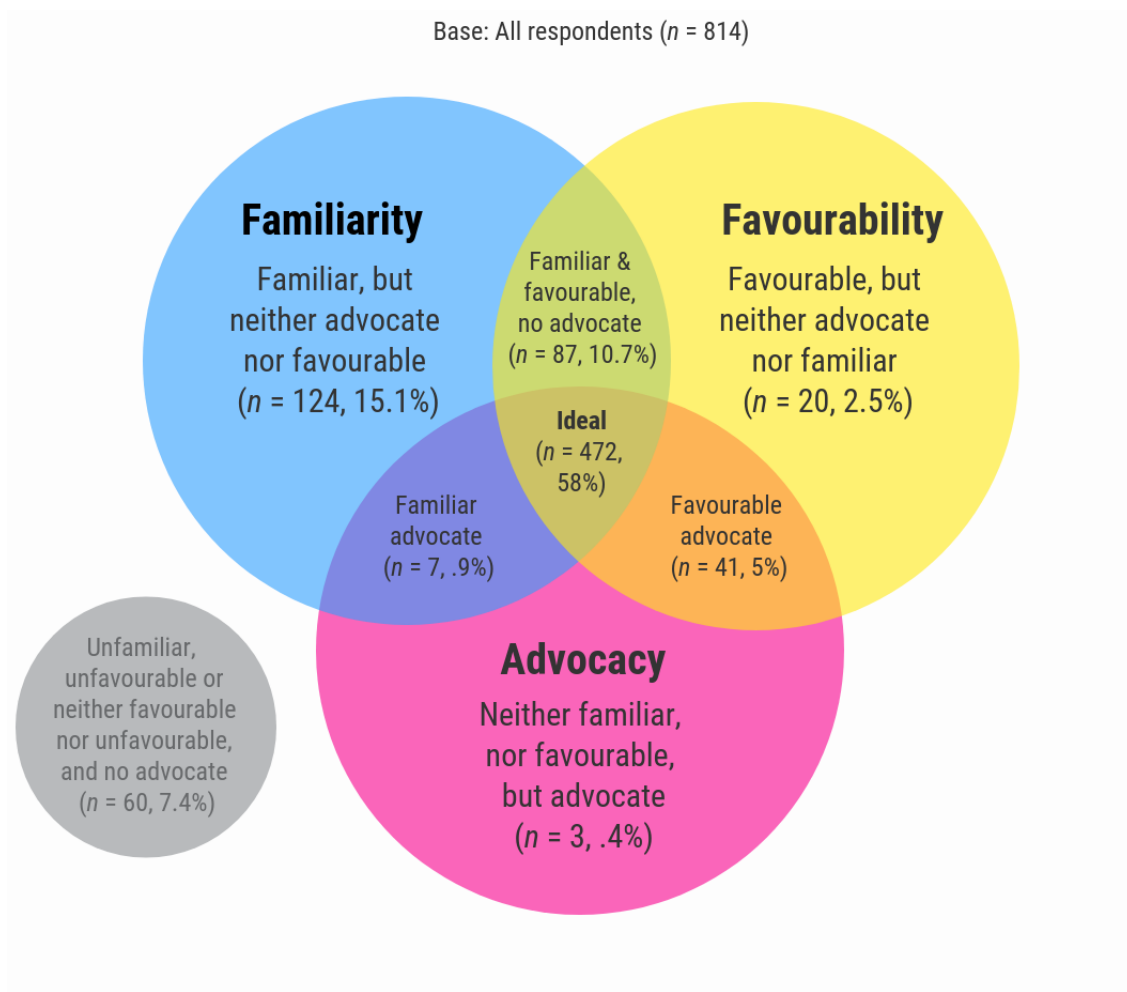
OVERALL PERCEPTIONS

1. Overall perceptions

This results chapter explores how stakeholders view the Arts Council and its overall performance as an organisation, as measured by an assessment of the Arts Council's *current* versus *ideal* characteristics. Stakeholders report their level of familiarity with the Arts Council, favourability and how they would speak about the Arts Council to others.

A majority of stakeholders are *familiar* with the Arts Council (*Figure 1*), while simultaneously holding a *favourable* attitude towards it and *speaking highly* of it if asked or without being asked ($n = 472, 58\%$).

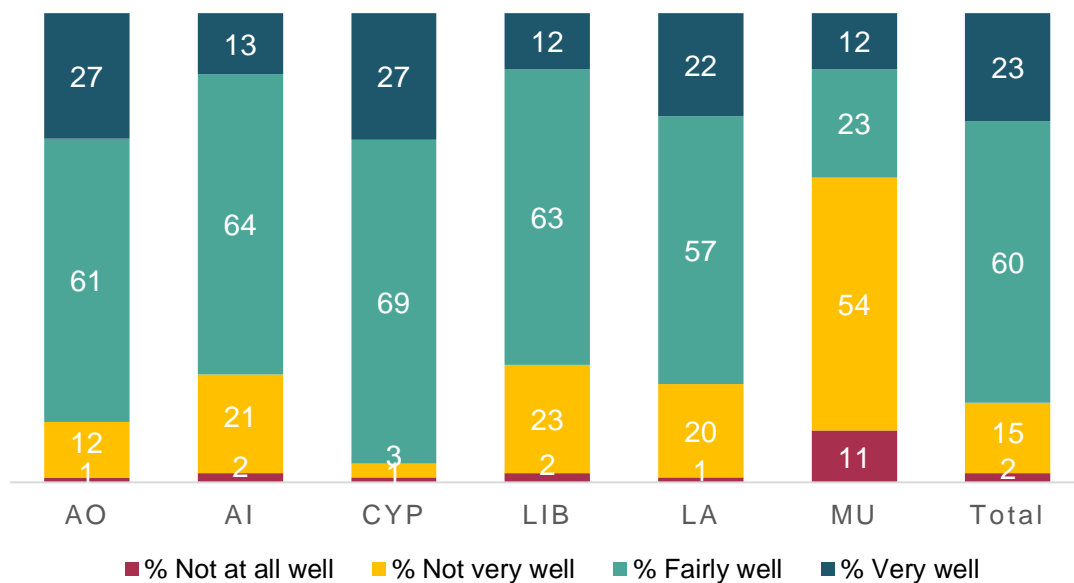
Figure 1. Stakeholders' level of Arts Council familiarity, favourability and advocacy



1.1 Familiarity

This section examines familiarity as a measure of how well stakeholders feel they know the Arts Council. The majority of stakeholders report a **high degree of familiarity** with the Arts Council England ($n = 804$, 83%), with a minority of respondents indicating low levels of familiarity ($n = 161$, 17%). Stakeholders who report **familiarity** with the Arts Council (see *Figure 2*) also indicate they know the Arts Council either *very well* ($n = 219$, 23%) or *fairly well* ($n = 585$, 60%). Those stakeholders who indicate *low familiarity* are split between knowing the Arts Council *not very well* ($n = 160$, 15%) and *not at all well* ($n = 15$, 2%).

Figure 2. Familiarity with the Arts Council



(Base: All respondents, $n = 954$, excluding Not applicable/No opinion)¹

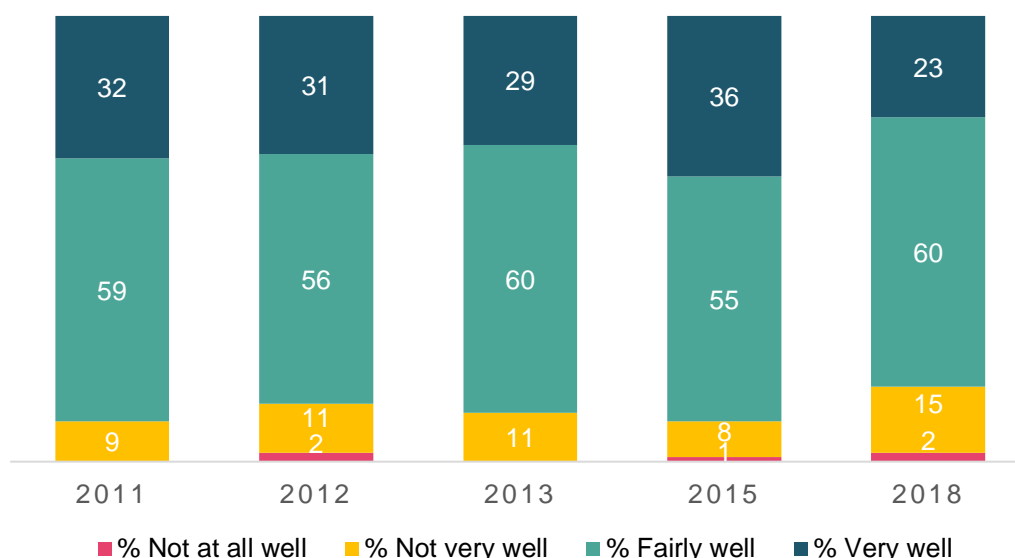
Evaluating change over time

Overall, the level of familiarity with the Arts Council among stakeholders is consistent with findings from previous years (see *Figure 3*), albeit findings from 2018 show small differences compared the 2015 findings. Stakeholders in 2018 report knowing the Arts Council *very well* (23%), which is a decrease in high levels of familiarity from the 2015 findings (36%, -13%²). Alternatively, an increase is evident in 2018 with stakeholders reporting *less familiarity* with the Arts Council compared to 2015 findings (8%, +7%).

¹ (AO = Arts organisations, AI = Arts individual, CYP = Children and Young People, LIB = Libraries [non NPO], LA = Local authorities, MU = Museums [non NPO])

² Here, and throughout the report, differences from the previous Stakeholder Focus Research results are presented as percentage points (not as proportional percent increases).

Figure 3. Reported levels of Arts Council familiarity over time



Familiarity and Frequency of Contact

As possible explanations for the familiarity response patterns, the findings show that the level of familiarity stakeholders report with the Arts *positively correlates* with the **duration** (number of years)³ and **frequency** (within specific times periods)⁴ of contact stakeholders have with the Arts Council. The duration and frequency of contact each show statistically significant differences.



For instance, stakeholders who report *over 10 years of contact* with the Arts Council also indicate stronger *familiarity* with the Arts Council ($n = 124$, 33% *very well*) than those in contact for 4-6 years ($n = 25$, 15% *very well*), 1-3 years ($n = 10$, 7% *very well*) or *less than a year* ($n = 9$, 13% *very well*)⁵.

This *positive* relationship between familiarity and years of contact may help explain differences among stakeholders. Likewise, stakeholders who are in contact with the Arts Council from 2-3 times per month are more likely to report knowing it *very well* ($n = 47$, 45%) than those in contact once every 2-3 months ($n = 44$, 22%) or less⁶.

³ Chi-squared: $\chi^2(12) = 104.3$, $p < .001$

⁴ Chi-squared: $\chi^2(21) = 226.1$, $p < .001$

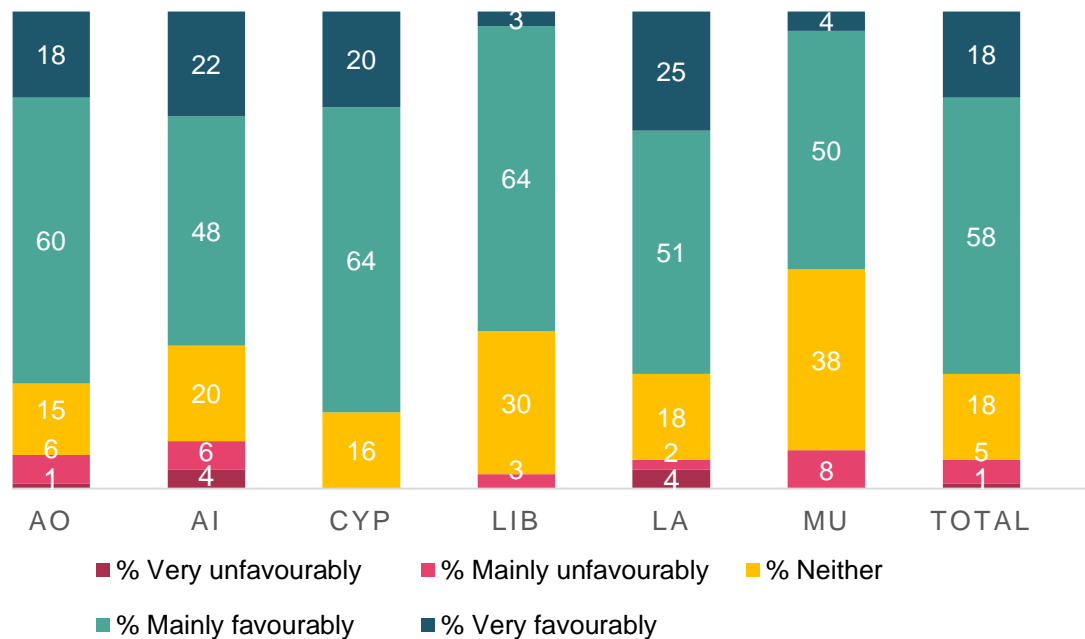
⁵ Unweighted proportions differ significantly at $\alpha = 0.05$

⁶ Unweighted proportions differ significantly at $\alpha = 0.05$

1.2 Favourability

Stakeholders indicate an overall favourable view of the Arts Council ($n = 643$, 76%). Most stakeholders take a favourable view of the Arts Council overall ($n = 491$, 58%), while a substantial proportion describe themselves as holding a *very favourable* impression ($n = 152$, 18%), as illustrated in *Figure 4*. An identical proportion of stakeholders are *neither favourable nor unfavourable* towards the Arts Council ($n = 148$, 18%) and only very small percentage hold an *unfavourable* perception of it ($n = 54$, 6%).

Figure 4. Favourability towards the Arts Council



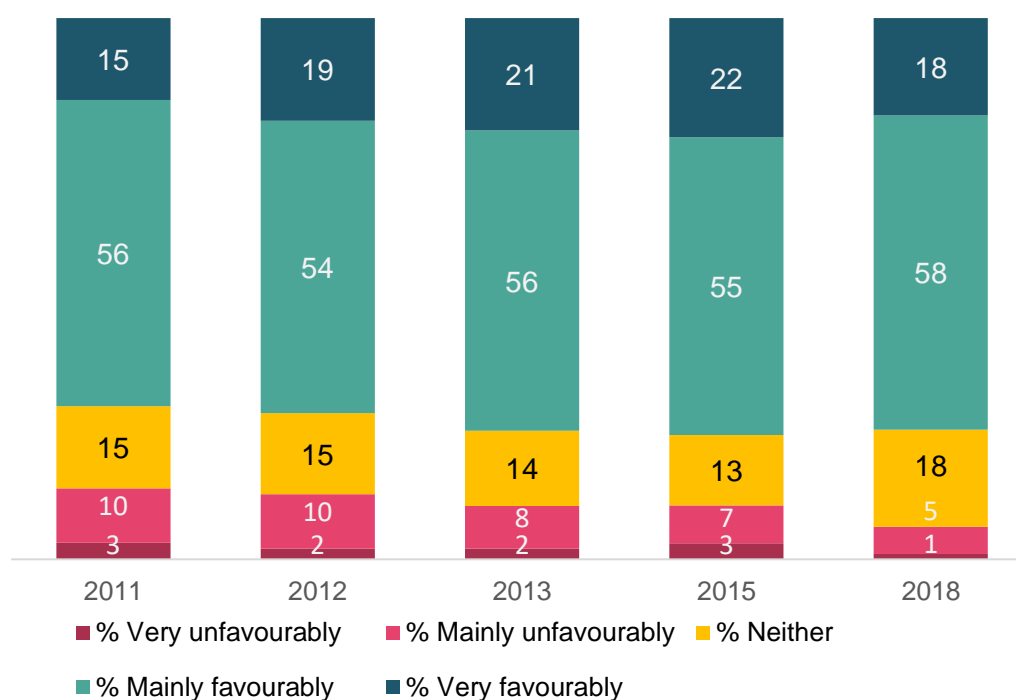
(Base: All respondents, $n = 838$, excluding Not applicable/No opinion)⁷

Evaluating change over time

Favourability scores for the Arts Council have remained consistent in each iteration of the Stakeholder Focus Research since 2011 findings. At the overall level, favourability has remained stable over time (see *Figure 5*). The majority of stakeholders view the Arts Council either *mainly* or *very favourably* in the present findings (76%), which is similar to findings from 2015 (78%, -2%) and 2013 (77%, -1%). Additionally, consistent decreases are evident in the percentage of stakeholders who express *unfavourable* views of the Arts Council, with 2018 (6%) being the lowest point since 2011 (13%). Both measures indicate *positive* trends from year-to-year.

⁷ (AO = Arts organisations, AI = Arts individual, CYP = Children and Young People, LIB = Libraries [non NPO], LA = Local authorities, MU = Museums [non NPO])

Figure 5. Changes over time in Favourability



Comparing stakeholder categories

Findings in this iteration show favourability correlates *positively* with stakeholders' degree of familiarity with the Arts Council⁸ (see Appendix 3 for details). For example, stakeholders who report knowing the Arts Council *very well* are more likely to view the Arts Council England *very favourably* ($n = 64$, 33%) than those who know the Arts Council *fairly well* ($n = 80$, 15%) or *not very well* ($n = 7$, 6%)⁹.

Likewise, stakeholders in frequent contact with the Arts Council tend to have a more favourable assessment of their interactions¹⁰. As an example, those who have contact with the Arts Council **2-3 times per month** are more likely to view the Arts Council *mainly favourably* ($n = 66$, 65%) than stakeholders in contact with the Arts Council **less than once per year** ($n = 20$, 37%)¹¹.

⁸ Chi-squared: $\chi^2(12) = 125.5$, $p < .001$

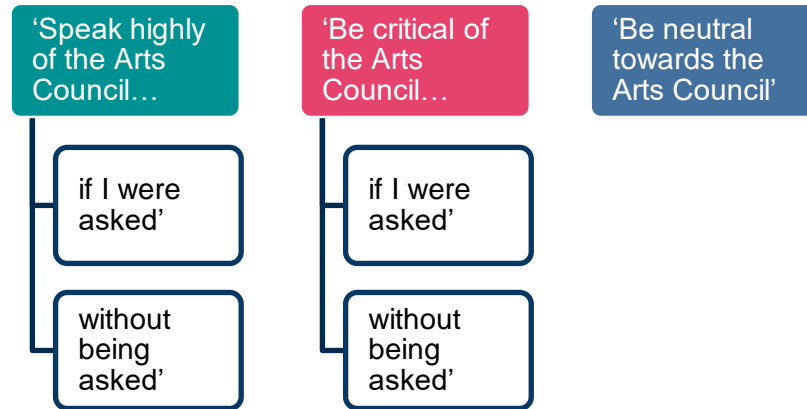
⁹ Unweighted proportions differ significantly at $\alpha = 0.05$

¹⁰ Chi-squared: $\chi^2(28) = 89.4$, $p < .001$

¹¹ Unweighted proportions differ significantly at $\alpha = 0.05$

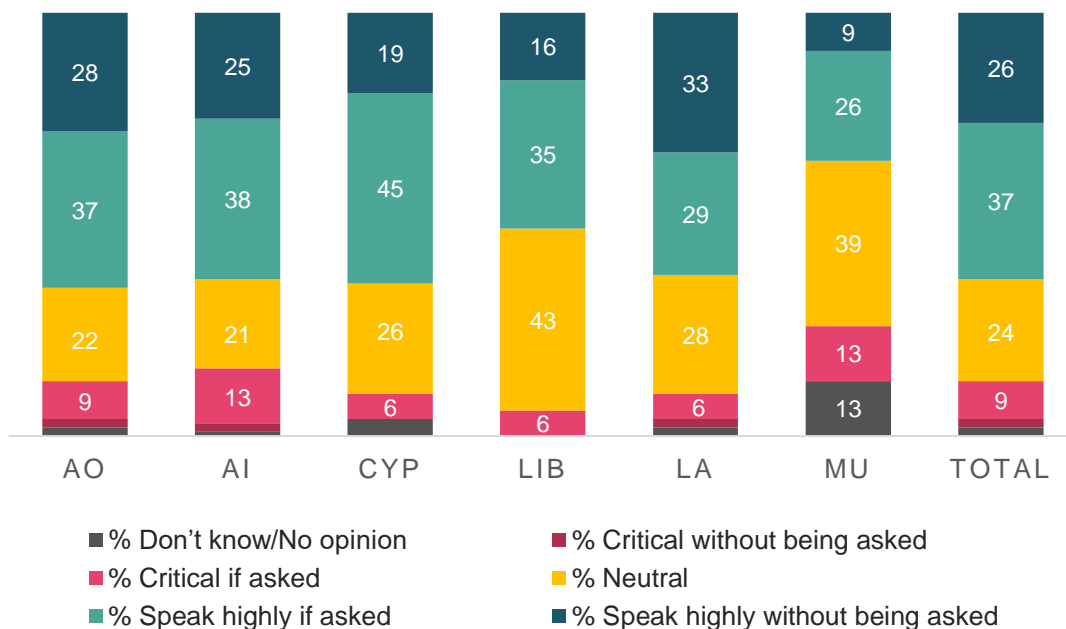
1.3 Advocacy

This section is based on stakeholders' responses to whether they would speak highly of the Arts Council to other people. This included the following response options:



Consistent with definitions from previous iterations of the Stakeholder Focus Research, 'advocates' are stakeholders reporting that they would speak highly of the Arts Council *if asked* ($n = 313$, 37%) or *without being asked* ($n = 222$, 26%). 'Non-advocates' are *neutral* ($n = 209$, 24%) and 'critics', defined as stakeholders who would speak critically *if asked* or *without being asked* ($n = 99$, 11%). The majority of stakeholders ($n = 535$, 63%) can be classified as 'advocates' for the Arts Council (see *Figure 6*).

Figure 6. Arts Council advocacy



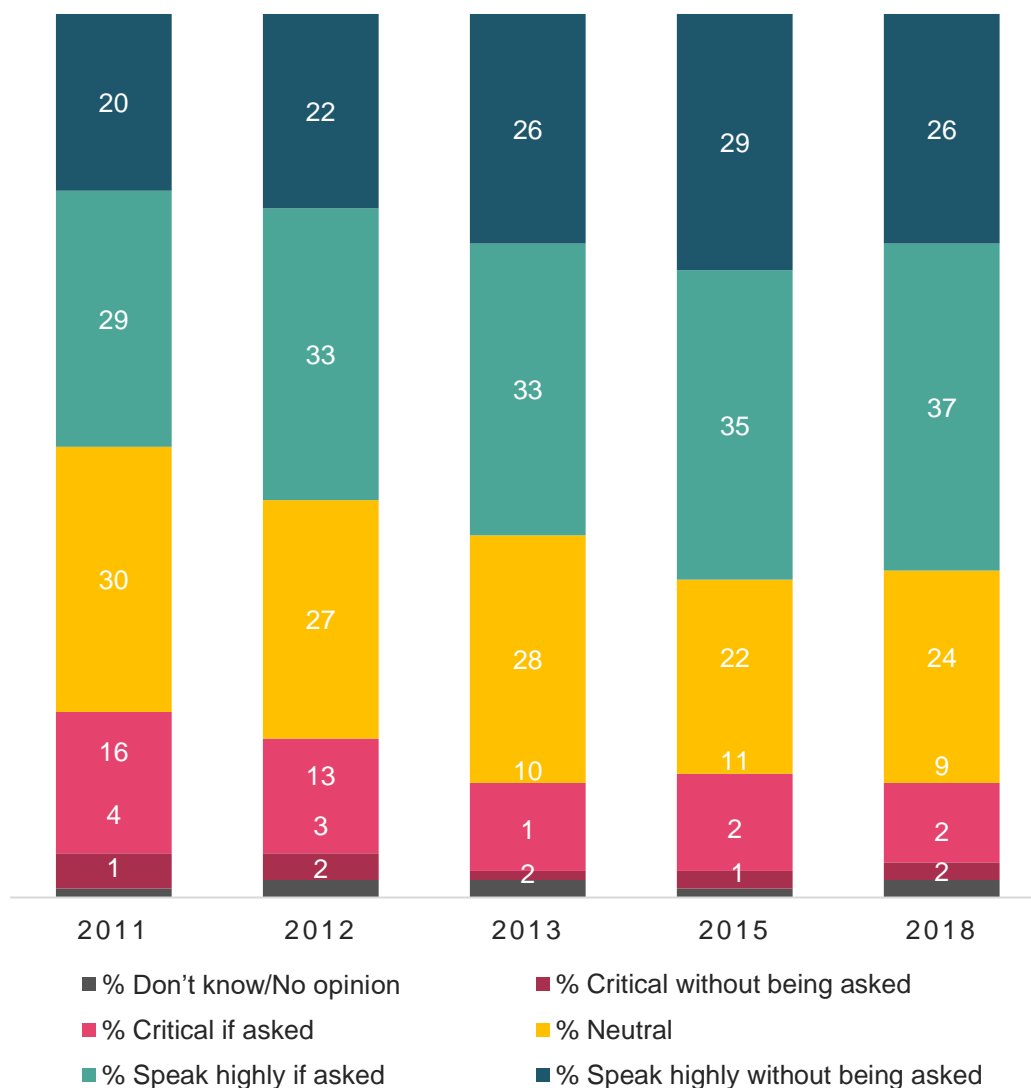
(Base: All respondents, $n = 831$, excluding Not applicable/No opinion)¹²

¹² (AO = Arts organisations, AI = Arts individual, CYP = Children and Young People, LIB = Libraries [non NPO], LA = Local authorities, MU = Museums [non NPO])

Evaluating change over time

Taking a long-term view, as with favourability, advocacy levels have remained largely consistent over time (see *Figure 7*). For example, the strongest type of advocacy-*would speak highly of the Arts Council without being asked* ($n = 222, 26\%$) is represented at a very similar percentage point level to 2015 findings (-3%) and 2013 levels (+0%). Because we find minimal indication of changes between 2018 and the previous two iterations, it is evident that the Arts Council has neither gained, nor lost, ground with stakeholders on their willingness to be advocates.

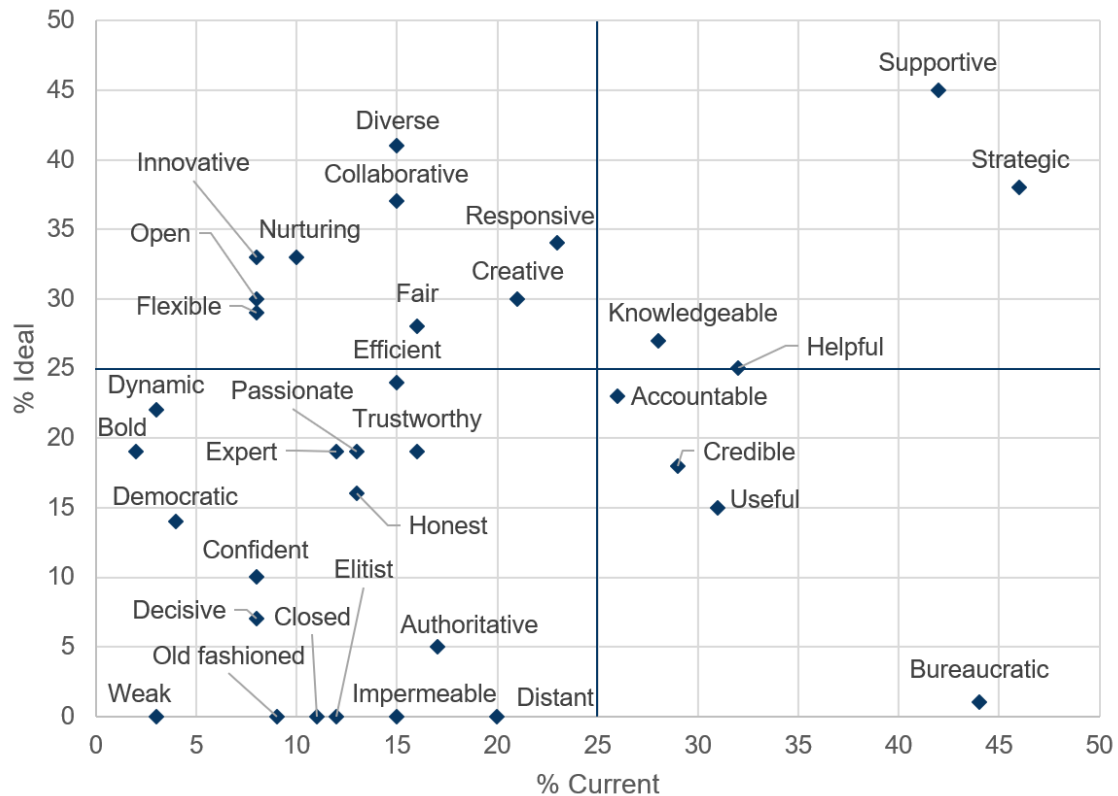
Figure 7. Advocacy changes over time



1.4 Current vs Ideal Characteristics

To gauge overall perceptions of the Arts Council, stakeholders were shown a list of words and phrases with the opportunity to choose up to six terms that reflect their ideas or impressions of Arts Council England ('Your ideas or impressions of the Arts Council'). Respondents were asked to select up to six words or phrases that reflect how 'the Arts Council *should be seeking to be*' (Figure 8).

Figure 8. Current versus ideal Arts Council characteristics



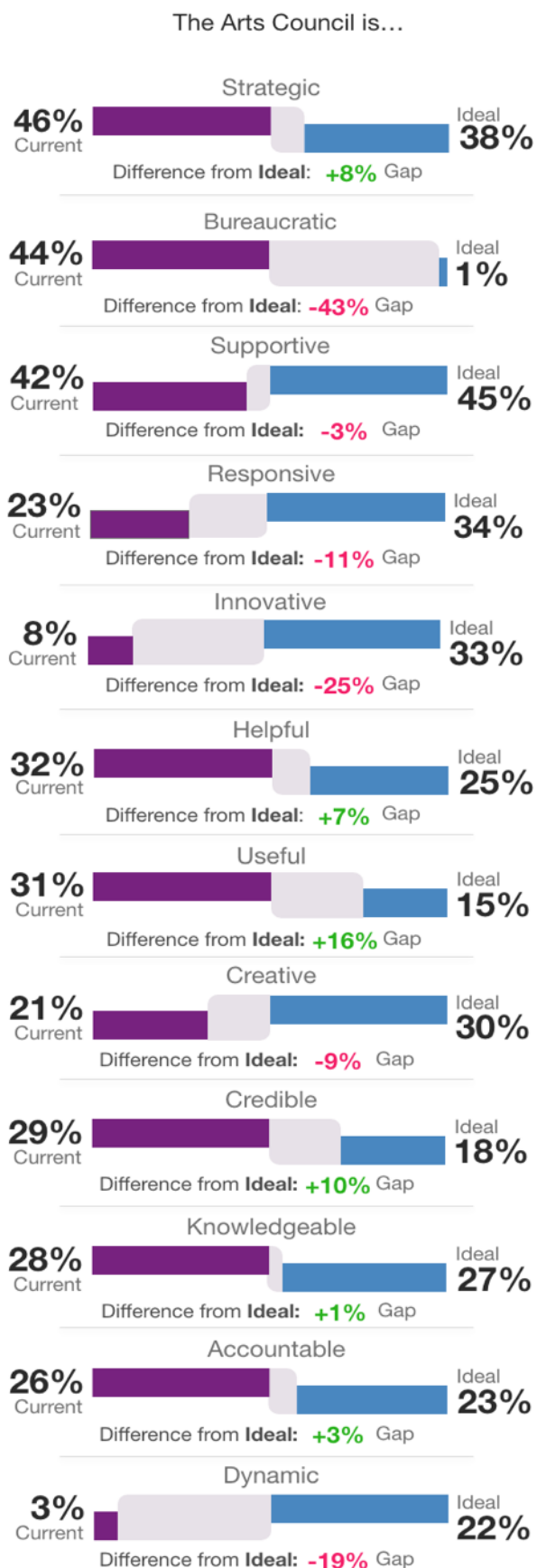
The figure above shows characteristics that are both viewed as ideal and currently applicable to the Arts Council ('meeting expectations') in the top right-hand corner, such as 'strategic' and 'supportive'. The figure shows the characteristic that is widely viewed as defining the Arts Council but not as desirable in the bottom right-hand corner, namely 'bureaucratic'.

Comparing Current and Ideal Characteristics

Stakeholders see Arts Council England's top *current* positive characteristics as 'strategic' ($n = 388$, 46%), 'supportive' ($n = 356$, 42%), 'helpful' ($n = 271$, 32%). Stakeholders also see the Arts Council as 'responsive' (23%), 'trustworthy' (16%), 'authoritative' (17%) and 'passionate' (13%). These closely match *ideal* characteristics stakeholders want to see in the Arts Council. Stakeholders see Arts Council's top *ideal* characteristics as 'supportive' ($n = 387$, 45%), 'diverse' ($n = 350$, 41%), 'strategic' ($n = 321$, 38%), 'collaborative' ($n = 318$, 37%) and 'innovative' (33%). Stakeholders see the Arts Council's *current* 'negative' characteristics as 'bureaucratic' (44%), 'distant' (20%) and 'elitist' (12%). Stakeholders' tendency to associate the Arts Council with 'bureaucracy' is a consistent theme throughout the 2017-18 Stakeholder Focus Research in both Strands One and Two.

The strongest results are on 'strategic' and 'supportive', characteristics that are both highly valued by stakeholders and widely viewed as already well represented in the Arts Council's current profile. On the other hand, there are evident gaps between stakeholders' views about Arts Council's ideal characteristics and current impressions.

These gaps represent areas of focus for the Arts Council's on future initiatives. Stakeholder views of Arts Council performance are examined in greater detail in the next section.



Evaluating change over time

There are notable differences between the 2018 results and previous Stakeholder Focus Research surveys (*Table 1*). First, 'creativity' was not ranked as highly in the present survey ($n = 257$, 30%) as in 2015 (42%, -12%). Also, 'diverse' is an increasingly desirable characteristic for the Arts Council (41%) compared to 2015 (28%, +13%) and 2013 (18%, +23%) findings. Also, compared to 2015, perceptions of the following characteristics show an uplift: 'Responsive' (23%, 2015: +10%), 'trustworthy' (16%, 2015: +7%), 'authoritative' (17%, 2015: +6%) and 'passionate' (13%, 2015: +5%). There is a decrease in the proportion of stakeholders who view the Arts Council as 'helpful' (2015: 40%, -8%) and an increase in the proportion viewing it as **impermeable** (15%; 2015: +7%) and **old-fashioned** (9%; 2015: +4%).

Table 1. Current versus ideal Arts Council characteristics

Values (%)	Current characteristics					Ideal characteristics				
	Year 2000s	'11	'12	'13	'15	'18	'11	'12	'13	'15
Strategic	40	41	45	44	46	39	44	46	38	38
Bureaucratic	48	44	43	44	44	2	1	1	1	1
Supportive	41	39	42	39	42	40	38	42	34	45
Helpful	40	43	45	40	32	27	25	27	18	25
Useful	32	27	29	28	31	11	11	9	10	15
Credible	20	21	25	27	29	17	18	18	17	18
Knowledgeable	24	25	25	22	28	28	27	29	21	27
Accountable	25	30	27	29	26	34	35	29	27	23
Responsive	14	13	16	13	23	26	28	27	24	34
Creative	11	15	15	20	21	37	35	38	42	30
Distant	22	18	19	17	19	1	1	1	1	*
Authoritative	12	13	14	11	17	10	11	11	9	5
Fair	-	-	-	17	16	-	-	-	21	28
Trustworthy	6	8	8	9	16	14	13	11	9	19
Collaborative	15	17	18	19	15	41	41	42	40	37
Diverse	14	13	12	17	15	20	21	18	28	41
Efficient	-	-	-	16	15	-	-	-	17	24
Impermeable	13	9	8	8	15	1	*	*	*	-
Honest	10	11	16	10	13	20	17	18	8	16
Passionate	7	8	7	8	13	17	15	15	15	19
Elitist	13	13	11	9	12	1	-	1	*	-
Expert	9	11	13	10	12	19	18	22	15	19
Closed	17	13	10	9	11	1	*	1	*	-
Nurturing	6	9	9	8	10	22	24	22	23	33
Old fashioned	8	7	7	5	9	1	*	*	*	*
Confident	7	7	7	5	8	10	14	13	11	10
Decisive	6	4	5	5	8	8	7	7	6	7
Flexible	5	6	6	5	8	19	22	19	20	29
Innovative	5	7	5	4	8	30	29	32	28	33
Open	6	7	6	5	8	22	22	18	19	30
Democratic	3	5	5	4	4	11	11	10	14	14
Dynamic	1	2	2	2	3	19	18	21	20	22
Weak	8	7	6	5	3	*	*	*	-	-
Bold	2	3	3	2	2	21	26	27	26	19

**PERFORMANCE AND
IMPACT**

2. Performance and impact

This chapter explores stakeholders' views about the Arts Council's performance and effectiveness in achieving its mission and goals through its key roles as a funder, development agency and advocate for the arts. The survey shows a majority of stakeholders recognise the Arts Council's focus and commitment to achieving its goals, priorities and mission (see *Figure 9*).

Figure 9. Arts Council performance, understanding of goals and performance on mission

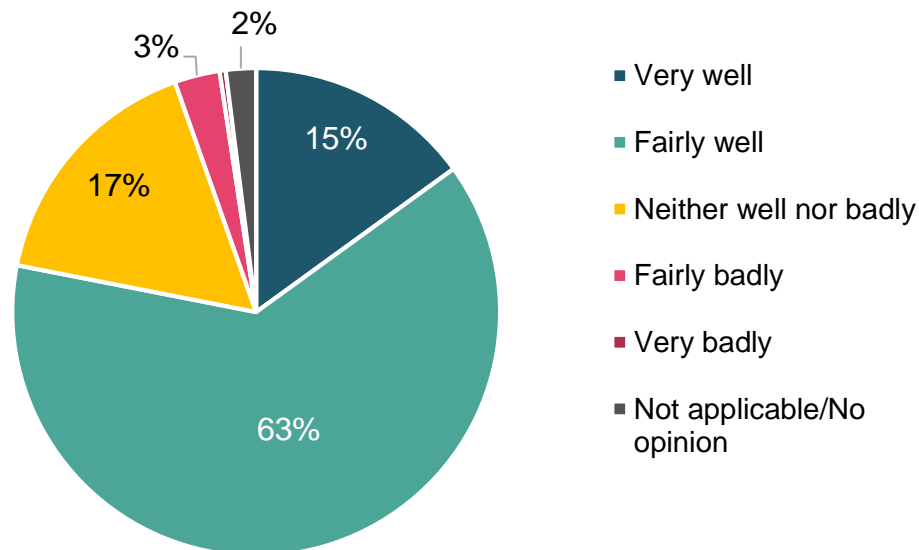


2.1 Overall performance

Stakeholders were asked to rate the Arts Council's overall performance as an organisation ('Overall, how do you feel the Arts Council performs as an organisation?').

Taken together, stakeholders share a positive view regarding the Arts Council's overall performance (see Figure 10), consistent with 2015 scores. Stakeholders indicate that the Arts Council performs well overall ($n = 663$, 78%), in line with 2015 findings (75%, +3%). However, a smaller proportion indicate that it performs *very well* ($n = 130$, 15%) compared to 2015 findings (19%, -4%). A minority of stakeholders report it is doing *neither well nor badly* ($n = 140$, 17%; 2015: 16%, +1%), while 3% report it performs *badly* ($n = 30$), indicating an improvement on 2015 findings (7%, -4%).

Figure 10. Perceptions of the Arts Council's overall performance



(Base: All respondents, $N = 982$)

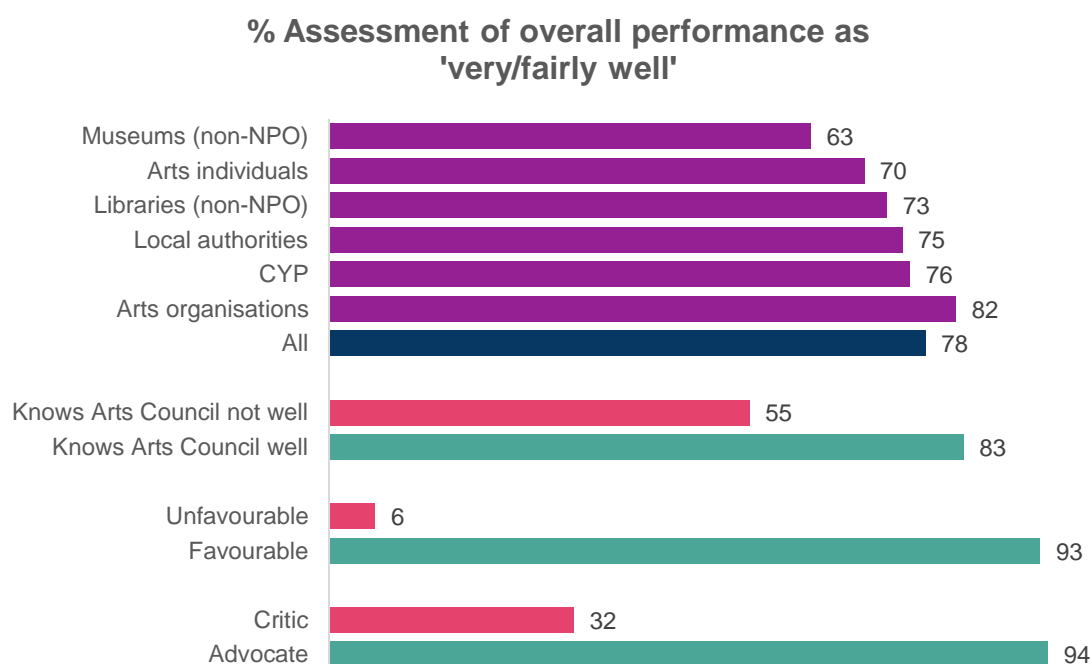
There is a noticeable difference in how the Arts Council's performance is perceived among different stakeholder groups (see Figure 11 and Appendix 3)¹³. Additionally, an association is evident between stakeholders' assessment of performance and their *familiarity* with the Arts Council¹⁴. For instance, those who report knowing the Arts Council *very well* are also more likely to report it is performing *very well* ($n = 52$, 27%), whereas this positive assessment is less evident among those who report knowing the Arts Council *fairly well* ($n = 68$, 13%)¹⁵.

¹³ Chi-squared: $\chi^2(28) = 40.8$, $p = .06$

¹⁴ Chi-squared: $\chi^2(12) = 80.2$, $p < .001$

¹⁵ Unweighted proportions differ significantly at $\alpha = 0.05$

Figure 11. Performance by stakeholder category and overall perceptions



(Base: All respondents, N = 982)

Furthermore, stakeholders' views of the Arts Council's performance have a strong positive association with *favourability*¹⁶ and *advocacy*¹⁷. Specifically, those who view the Arts Council *very favourably* are more likely to perceive the Arts Council is performing *very well* ($n = 82$, 56%) compared to those who view the Arts Council *mainly favourably* ($n = 42$, 9%)¹⁸.

Moreover, there is a correlation between stakeholder assessment of Arts Council performance and advocacy. Those who indicate that the Arts Council is performing *very well* are more likely to speak highly of the Arts Council *without being asked* ($n = 84$, 40%) than to say they would speak highly of the Arts Council only *if asked* ($n = 39$, 13%)¹⁹. In sum, statistical analysis shows that those who view the Arts Council more favourably also tend to rate its performance higher, while the lower they rate Arts Council performance, the more critically stakeholders report they would speak about the Arts Council²⁰.

¹⁶ Chi-squared: $\chi^2(16) = 789$, $p < .001$

¹⁷ Chi-squared: $\chi^2(16) = 469.7$, $p < .001$

¹⁸ Unweighted proportions differ significantly at $\alpha = 0.05$

¹⁹ Unweighted proportions differ significantly at $\alpha = 0.05$

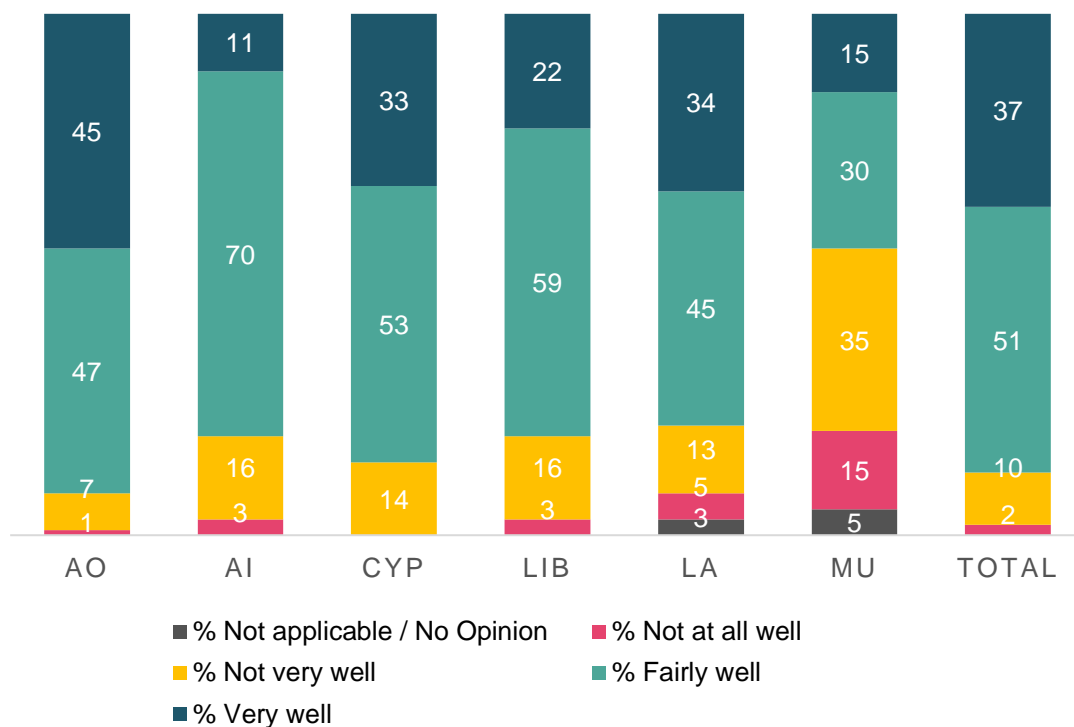
²⁰ This uses multiple linear regression, a statistical analysis. The complete analysis is provided in the **Technical Appendix (TA1)**.

2.2 Mission and goals

2.2.1 Understanding of the Arts Council's goals and priorities

Stakeholders' self-reported understanding of Arts Council goals and priorities is high (see *Figure 12*). Stakeholders generally report they understand its goals and priorities well ($n = 679$, 88%), which is similar to 2015 and 2013 findings (+0%). This includes more than a third of respondents who say they understand these goals and priorities *very well* ($n = 286$, 37%; 2015: 35%, +2%). At the same time, 12% indicate they do *not* understand Arts Council goals and priorities well ($n = 93$), similar to 2015 findings (+0%).

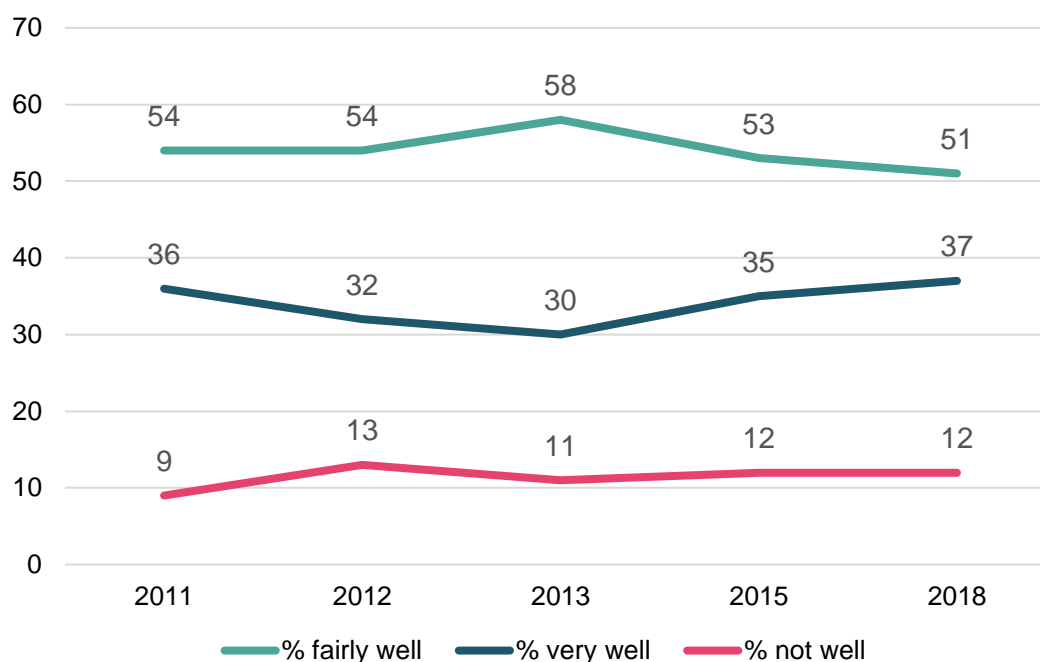
Figure 12. Understanding of the Arts Council's goals and priorities



(Base: $N = 982$)

Overall rates of self-reported understanding of Arts Council goals and priorities have been relatively stable over time (see *Figure 13*).

Figure 13. Understanding of goals and priorities over time



Levels of self-reported understanding of the Arts Council’s goals and priorities are associated with stakeholder category²¹ (also see *Appendix 3*). Specifically, arts individuals are more likely to report that they understand the Arts Council’s goals and priorities at the lower level of *fairly well* ($n = 70, 70\%$), compared to arts organisations ($n = 250, 47\%$).

Findings show that stakeholders’ length of experience with the Arts Council is also associated with reported understanding of its goals and priorities²². Stakeholders who have been in contact with the Arts Council for more than 10 years ($n = 167, 49\%$) or 7-10 years ($n = 49, 49\%$) are significantly more likely to indicate that they understand the Arts Council’s goals and priorities *very well* than those who have been in contact 4-6 years ($n = 43, 30\%$), 1-3 years ($n = 18, 15\%$) or less than one year ($n = 6, 11\%$)²³.

²¹ Chi-squared: $\chi^2(21) = 115.9, p < .001$

²² Chi-squared: $\chi^2(12) = 94.4, p < .001$

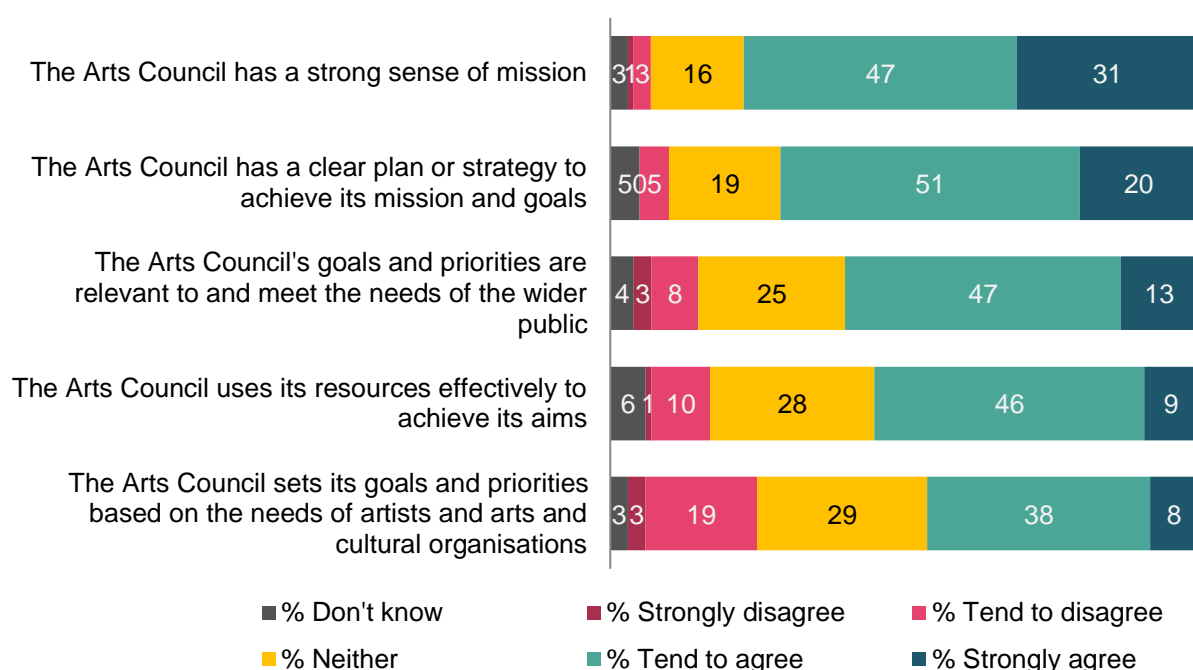
²³ Unweighted proportions differ significantly at $\alpha = 0.05$

2.2.2 Performance on mission

Most stakeholders agree that the Arts Council has a ‘*strong sense of mission*’ ($n = 612$, 78%) and that the Arts Council has a ‘*clear plan or strategy*’ to achieve its mission and goals’ ($n = 555$, 71%).

Stakeholders’ tend to take a positive view on the relevance of the Arts Council’s goals and priorities to the ‘*needs of the wider public*’ ($n = 471$, 60% agree), on whether its goals and priorities reflect the ‘*needs of artists and arts and culture organisations*’ ($n = 359$, 46% agree) and on ‘*how effectively the Arts Council is using its resources*’ in service of its aims ($n = 427$, 54% agree).

Figure 14. Views on Arts Council mission-related performance



(Base: All respondents, $N = 982$)

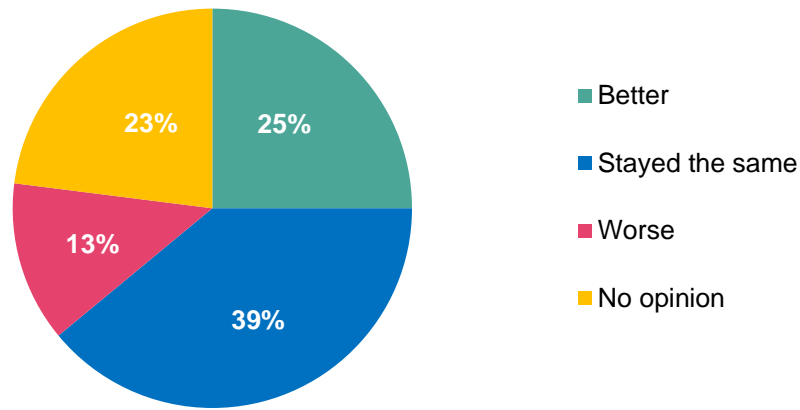
These results in the 2018 survey (summarised in *Figure 14*) closely resemble the 2015 Stakeholder Focus Research findings.

2.2.3 Effectiveness in performing on mission over the past year

To identify whether stakeholders see the Arts Council moving in the right direction in terms of its effectiveness at achieving its goals, they were asked: ‘*The Arts Council aims to achieve great art, libraries and museums for everyone. Do you think that the effectiveness of the Arts Council in achieving this has got better, worse or stayed the same over the past year?*’.

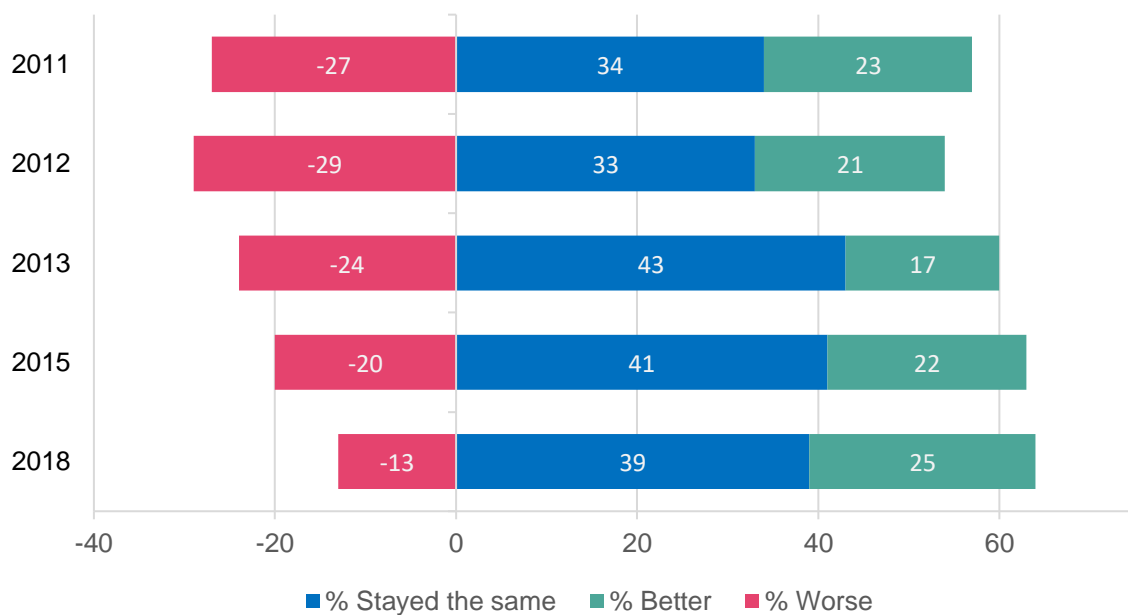
Most stakeholders respond that the Arts Council has either maintained its level of effectiveness or become more effective in achieving its aims over the past year ($n = 550$, 64%). The Arts Council's overall performance receives a generally positive assessment from most stakeholders (see *Figure 15*).

Figure 15. Perceived effectiveness changes over time (Base: $n = 857$)



Moreover, stakeholders are more positive about its effectiveness in the current survey compared to previous years (see *Figure 16*). While the largest category of respondents indicate that the Arts Council's effectiveness has not changed in the past year ($n = 337$, 39%), a quarter suggest it has improved ($n = 213$, 25%) – the highest percentage point level observed since 2011.

Figure 16. Perceived effectiveness changes over time

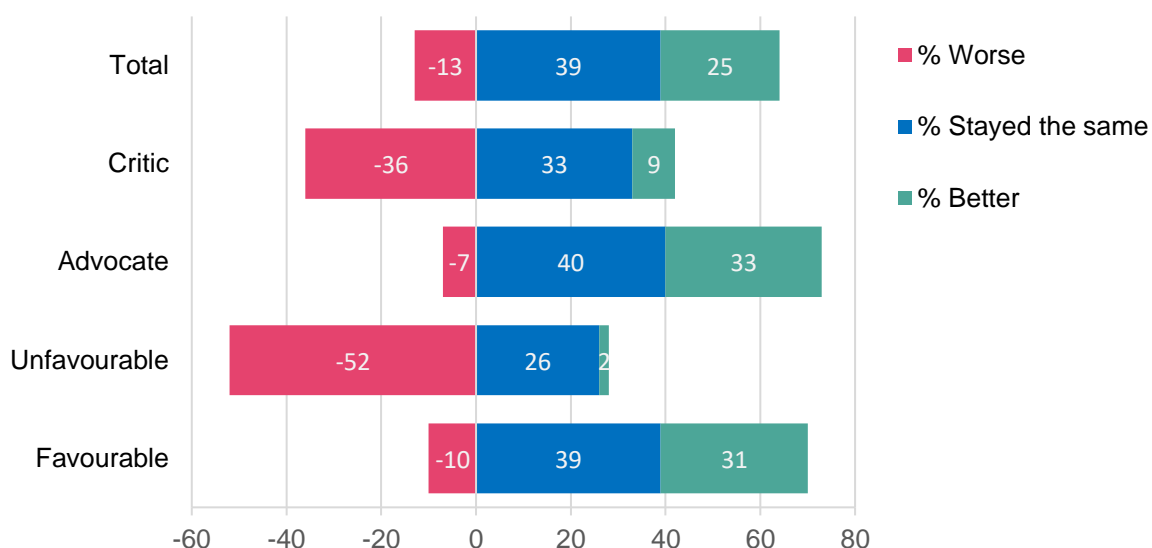


In the current report, a minority of respondents indicate the Arts Council has become *less effective over the past 12 months* ($n = 114$, 13%). This represents a decrease compared to 2015 (20%, -7%), thus continuing a trend of positive improvement on this measure that began in 2012.

Whether Stakeholders' view the Arts Council as having improved its effectiveness appears linked to their overall perception of the Arts Council (see *Figure 17*), including favourably and how it is spoken about^{24,25}.

Stakeholders who indicate an unfavourable stance towards the Arts Council ($n = 26$, 52%) or an inclination to speak critically ($n = 34$, 36%) are far more likely to report that the Arts Council's effectiveness has worsened over the past year, compared to those who indicate a favourable stance ($n = 52$, 10%) or those who advocate for the Arts Council ($n = 36$, 7%)²⁶.

Figure 17. Perceived effectiveness changes by stakeholder favourability and advocacy



2.2.4 Reasons for reporting improvement in effectiveness

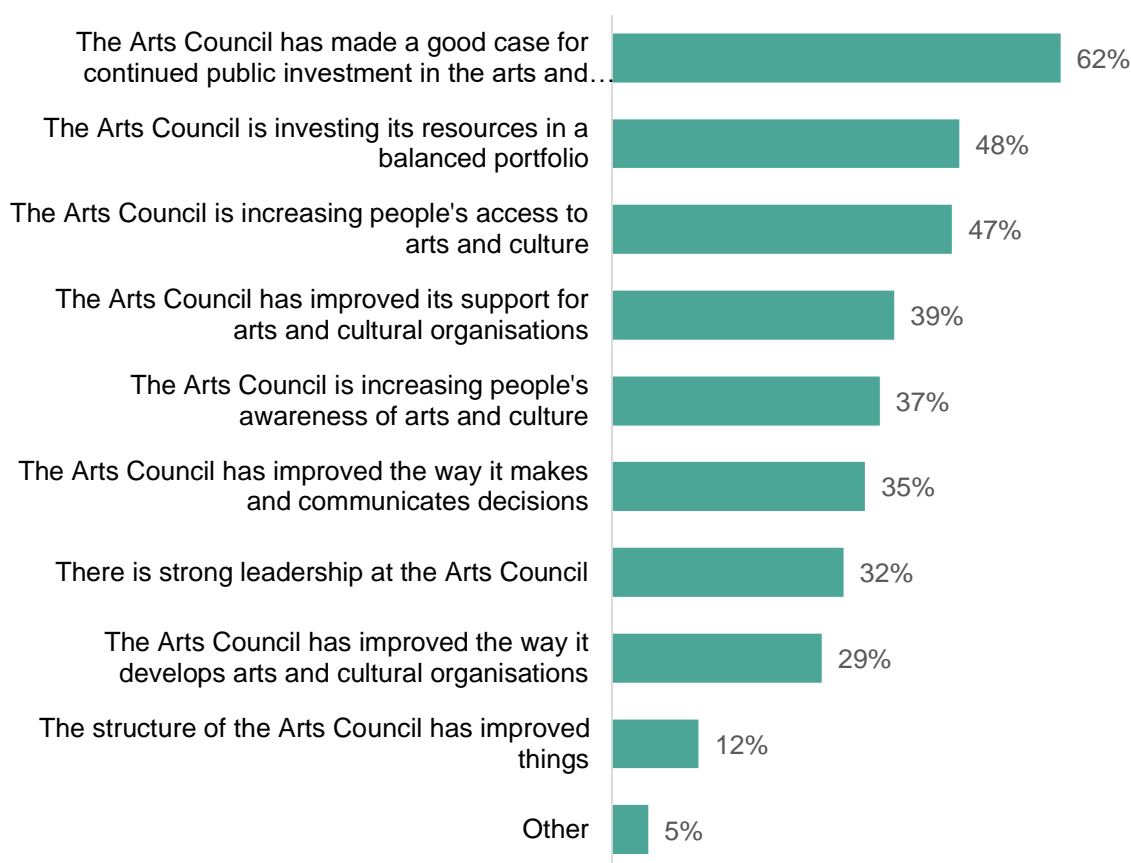
To explore the explanations for stakeholders reporting the Arts Council has improved its effectiveness, respondents could choose between a series of predefined statements, as used in previous stakeholder surveys. If none of the options applied, respondents could write their own reasons for thinking Arts Council performance improved. The following results concentrate only those stakeholders who indicate that the Arts Council's performance has improved ($n = 213$, 25%, see *Figure 18*).

²⁴ Chi-squared: $\chi^2(12) = 135.6$, $p < .001$

²⁵ Chi-squared: $\chi^2(12) = 108.6$, $p < .001$

²⁶ Unweighted proportions differ significantly at $\alpha = 0.05$

Figure 18. Reasons why Arts Council effectiveness has improved



(Base: Stakeholders indicating improvement that the Arts Council's performance, N = 213)

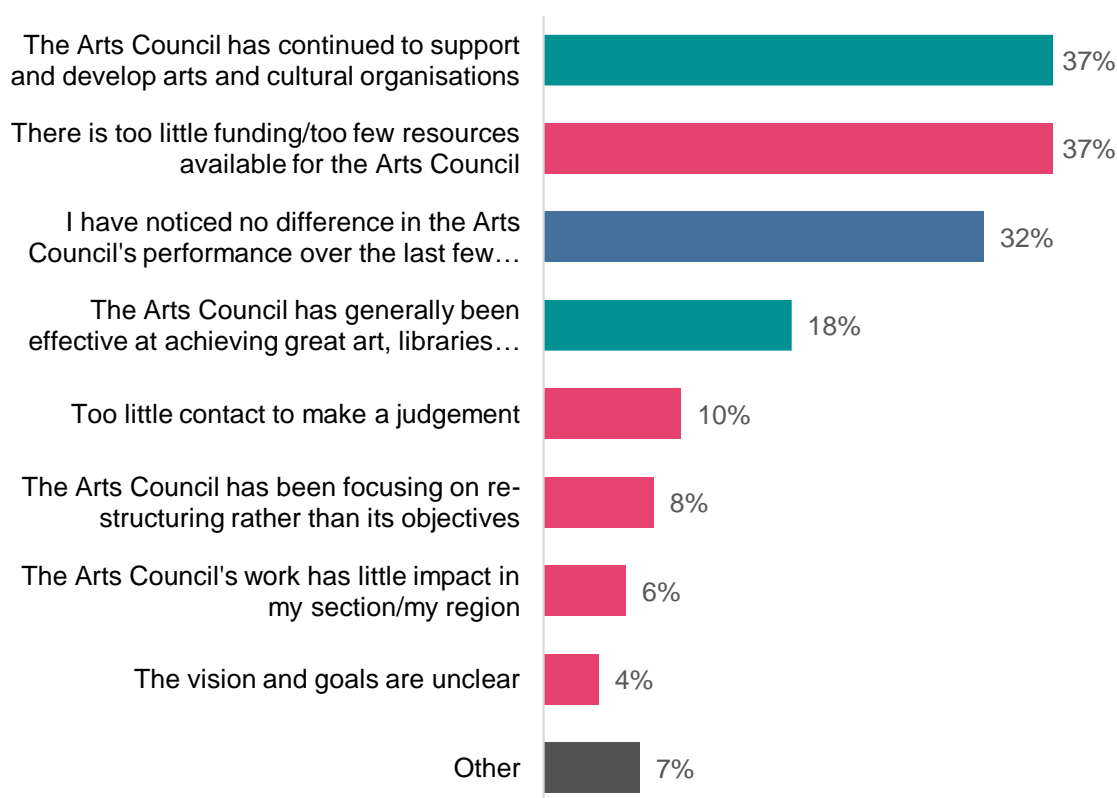
Overall, stakeholders most commonly refer to the Arts Council's advocacy role, with a majority indicating that the Arts Council has *made a good case for continued public investment* ($n = 133$, 62%). Many also refer to the Arts Council's *balanced investment strategy* ($n = 102$, 48%) and that the Arts Council has *increased people's access* ($n = 100$, 47%) to arts and culture. Stakeholders further indicate that the Arts Council has *improved in the way it supports arts and cultural organisations* ($n = 82$, 39%) and that the Arts Council is *increasing people's awareness of arts and culture* ($n = 79$, 37%).

Further reasons that stakeholders provide for Arts Council improvements include *strong leadership* ($n = 67$, 32%), *better decision-making and communication processes* ($n = 74$, 35%) and *greater development support for arts and cultural organisations* ($n = 62$, 29%). A small percent of stakeholders indicate 'other' reasons ($n = 10$, 5%), such as 'better relationship officers [managers]' or the inclusion of museums and libraries as part of the national portfolio.

2.2.5 Reasons for stating effectiveness remained the same

The majority of stakeholders do not see a change in the Arts Council's performance over the past year ($n = 337$, 39%, see *Figure 19*). Most stakeholders indicate the Arts Council has continued to support and develop arts and cultural organisations ($n = 126$, 37%) and a smaller proportion cite that the Arts Council is effective at achieving great art, libraries and museums for everyone ($n = 62$, 18%). About a third of stakeholders have noticed no difference in the Arts Council's performance in the last year ($n = 109$, 32%).

Figure 19. Reasons why Arts Council effectiveness has remained the same



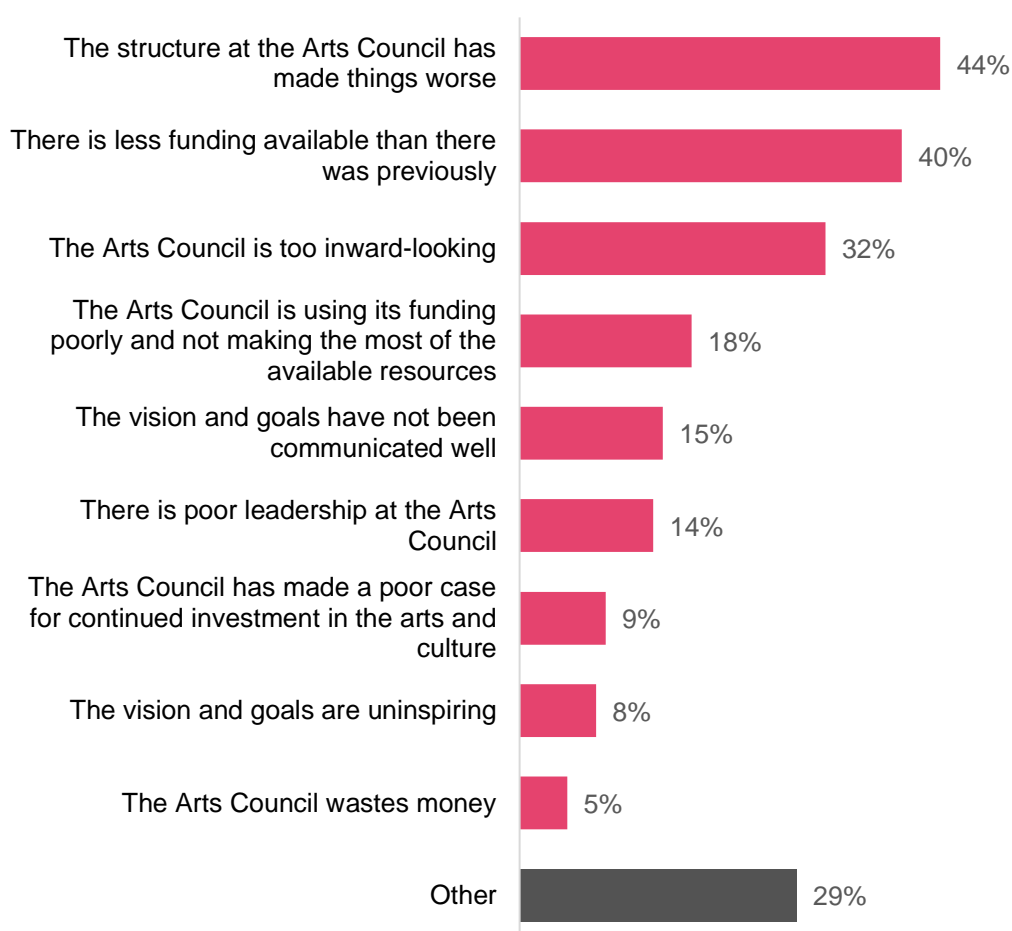
(Base: Stakeholders indicating that performance has stayed the same, $N = 337$)

The perception of *no change* also focuses on areas where the Arts Council is seen to need improvement. Those who report the Arts Council's effectiveness has stayed the same, indicate there is *too little funding available* ($n = 125$, 37%), although this has decreased from 2015 (52%, -15%). Stakeholders report the Arts Council has focused on *restructuring rather than on its objectives* ($n = 27$, 8%), but this measure has also decreased compared to 2015 findings (17%, -9%). Still, a minority of these stakeholders indicate they either have *too little contact with the Arts Council to make a judgement* ($n = 33$, 10%), that there is *little impact in their area* ($n = 21$, 6%), or that *visions and goals are unclear* ($n = 12$, 4%). Few stakeholders cited 'other reasons' ($n = 25$, 7%) as an explanation for no change in Arts Council effectiveness.

2.2.6 Reasons for believing the Arts Council has become less effective

A number of stakeholders indicate that the Arts Council's effectiveness has declined ($n = 114$, 13%, see *Figure 20*). The most selected reason is that *the structure of the Arts Council has made things worse* ($n = 50$, 44%), which is similar to 2015 findings (47%, -3%).

Figure 20. Reasons why Arts Council effectiveness has worsened



(Base: Stakeholders indicating performance has declined, N = 114)

Shortcomings in terms of funding are perceived as a major issue, yet less so than in previous years. Among those who indicate that the Arts Council has become less effective in the last year, a substantial proportion indicate that there is less funding available ($n = 45$, 40%), a notable decrease compared to 2015 findings (68%, -28%). In addition, about a third suggest that the Arts Council is too inward-looking ($n = 36$, 32%). Other issues were highlighted less frequently, including those who report the Arts Council is using its funding poorly ($n = 20$, 18%), that its visions and goals have not been communicated well ($n = 17$, 15%) and that there is poor leadership at the Arts Council ($n = 16$, 14%).

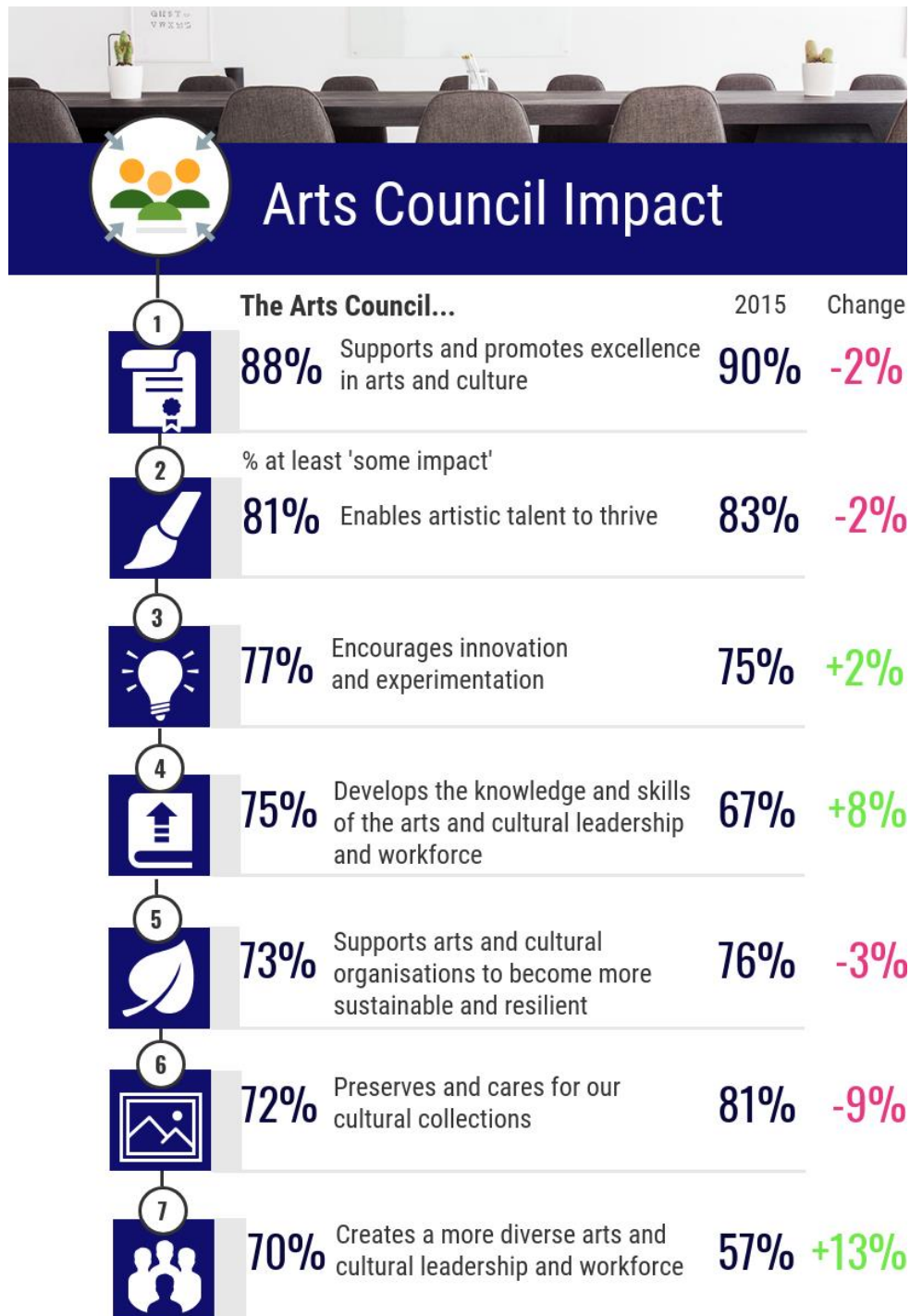
In contrast, fewer respondents highlight concern about the Arts Council making a poor case for continued investment in the arts and culture ($n = 10$, 9%), that its vision and goals are uninspiring ($n = 9$, 8%) or that the Arts Council wastes money ($n = 6$, 5%) as an explanation for a decline in its effectiveness.

It also worth mentioning that there a number of 'other' reasons for a perceived decline in the Arts Council's effectiveness ($n = 33$, 29%). Compared to 2015, the percentage of those who cite 'other' reasons has substantially increased in 2017/18 (+19%). Many of these comments refer either to the reduction in Arts Council staff negatively affecting the engagement and work with stakeholders ($n = 10$) or the funding application process ($n = 7$), which some believe to be unbalanced (e.g. favouring certain types of organisations) and too burdensome or 'intimidating' for first-time applicants, especially individual artists and small organisations.

2.3 Impact

The survey shows that the Arts Council's work is widely viewed as having an impact in several key aspects of arts and culture policy and practice in England (see *Figure 21*).

Figure 21. Perceived Arts Council impact in key areas of activity



Base: All respondents ($n = 982$)

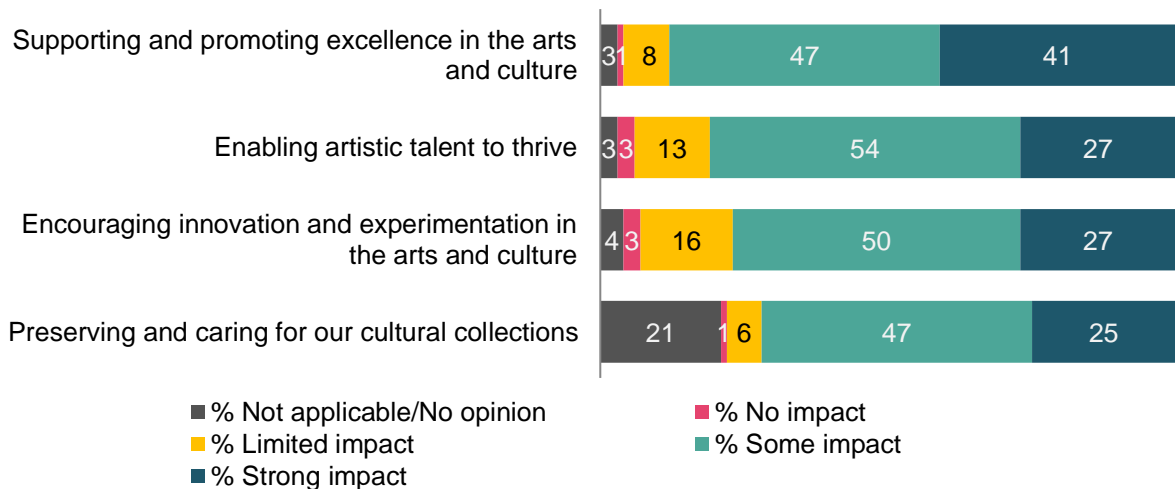
2.3.1 Impact in areas of key activities

In seeking to enable artistic talent to thrive and to create access to inspiring arts and culture for everyone, the Arts Council embraces the following key aims:

Enable artistic talent to thrive	Support and promote excellence in arts and culture	Enable more people to experience and be inspired by arts and culture	Encourage greater awareness of and enthusiasm about arts and culture
Support arts/cultural organisations to become more sustainable and resilient	Encourage innovation and experimentation in arts and culture	Develop the knowledge and skills of arts and cultural leadership and workforce	Create a more diverse arts and cultural leadership and workforce
Promote arts and culture that reflect the diversity of contemporary England	Enable every child and young person to experience arts and culture	Ensure access to knowledge and learning experiences for all	Preserve and care for cultural collections

When asked about the Arts Council’s performance in each of these key areas, stakeholders are generally positive and most believe that it makes a positive difference in line with its overarching goals and priorities (see *Figures 22 to 24*). Compared to 2015, there has been little change, although proportions have shifted for “*preserving and caring for our cultural collections*”. While in 2018, most report that the Arts Council has *at least some impact* in this respect ($n = 572, 72\%$, see *Figure 22*), this was more in the last report (2015: 81%, -9%). Meanwhile, the share of respondents with no opinion on this measure has tripled ($n = 166, 21\%$; 2015: 7%, +14%).

Figure 22. Impact in key areas of activity

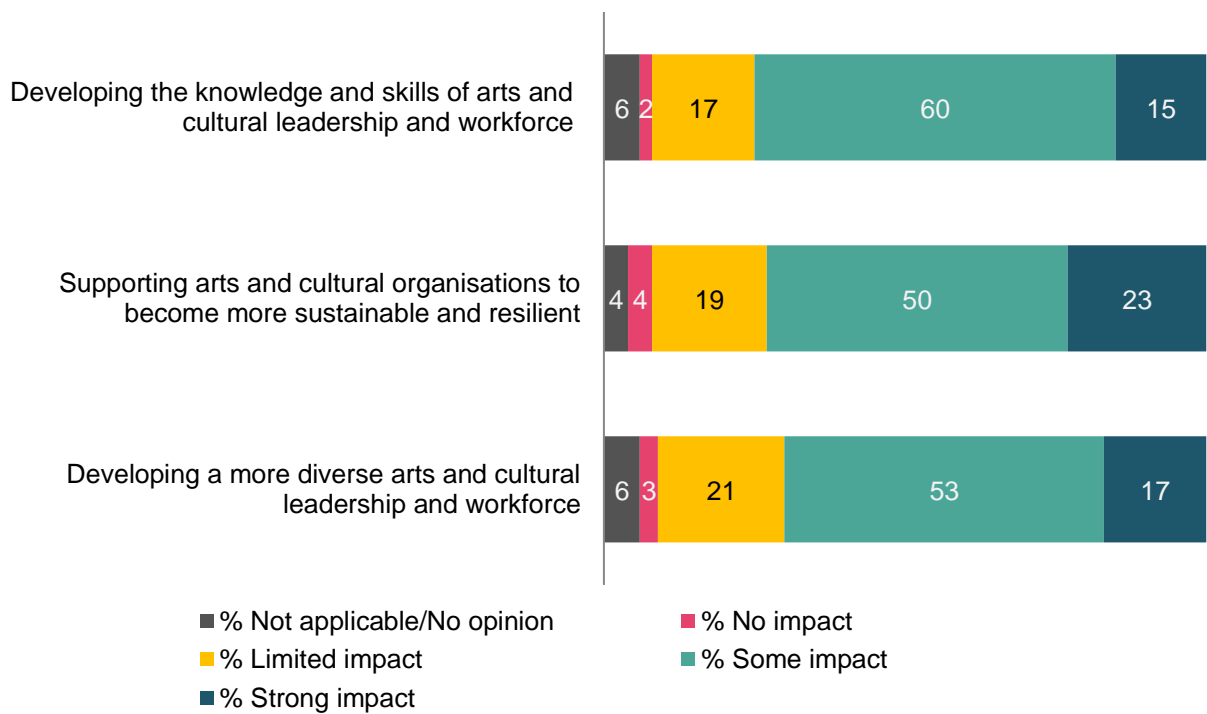


(Base: All respondents, $N = 982$)

Stakeholders strongly value the Arts Council’s impact on the arts and culture ecology in England. A majority report the Arts Council has an impact in *supporting and promoting excellence in arts and culture* ($n = 704, 88\%$), while many indicate it has a *strong impact* in this area ($n = 325, 41\%$). Furthermore, most stakeholders indicate that it has an impact in *enabling artistic talent to thrive* ($n = 655, 81\%$) and that the Arts Council makes a positive impact by *encouraging innovation and experimentation* in the arts and culture ($n = 619, 77\%$). Finally, there is some consensus that the Arts Council has an impact in preserving and caring for cultural collections ($n = 572, 72\%$).

The Arts Council is also seen to make a positive difference to the arts and culture sector (see *Figure 23*). Most stakeholders indicate that the Arts Council has an impact in *developing the knowledge and skills of the arts and cultural leadership and workforce* ($n = 597, 75\%$). In addition, most stakeholders report that the Arts Council has an impact in *supporting arts and culture organisations to become more sustainable and resilient* ($n = 591, 73\%$) and in *developing a more diverse arts and cultural leadership and workforce* ($n = 563, 70\%$).

Figure 23. Impact on the arts and cultural leadership and workforce

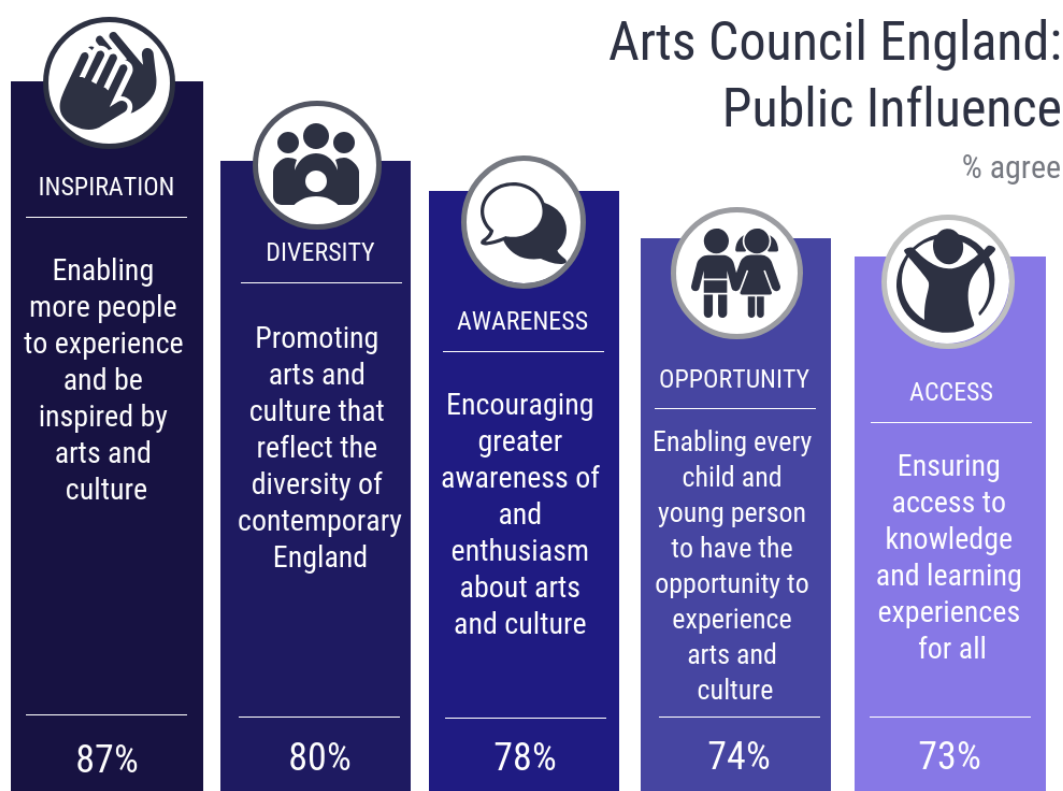


(Base: All respondents, $N = 982$)

2.3.2 Arts Council influence on the wider public

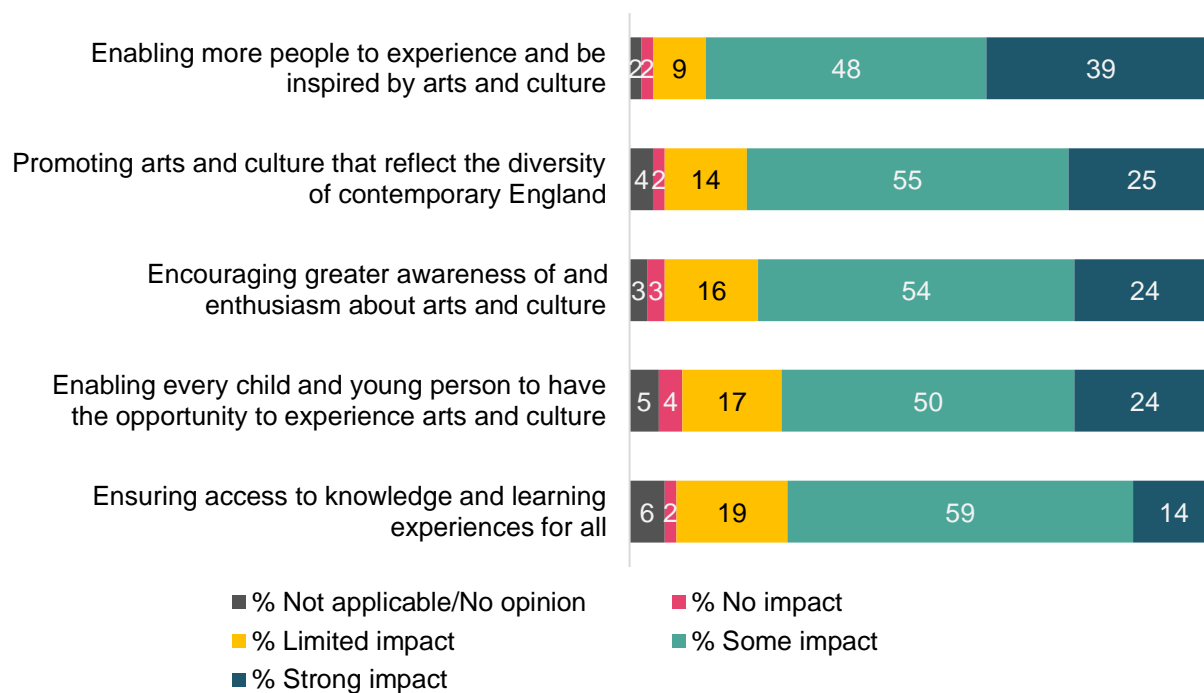
Another of the Arts Council's key functions is to increase people's access to arts and culture. Stakeholders are largely confident in the Arts Council's capability in promoting access to, and getting people to be inspired by, arts and culture (see *Figures 24 and 25*). Most stakeholders report the Arts Council has an impact in *enabling more people to experience and be inspired by arts and culture* ($n = 705$, 87%), while many perceive a *strong impact* in this regard ($n = 317$, 39%).

Figure 24. Views on Arts Council's impact on the wider public



A large proportion of stakeholders also indicate that the Arts Council has an impact in *promoting arts and culture that reflect the diversity of contemporary England* ($n = 640$, 80%). Furthermore, the majority of stakeholders value the Arts Council's role in *encouraging greater awareness of and enthusiasm about arts and culture* ($n = 629$, 78%), *enabling every child and young person to have the opportunity to explore arts and culture* ($n = 595$, 74%), and *ensuring access to knowledge and learning experiences for all* ($n = 581$, 73%), see *Figure 25* below for a proportional breakdown.

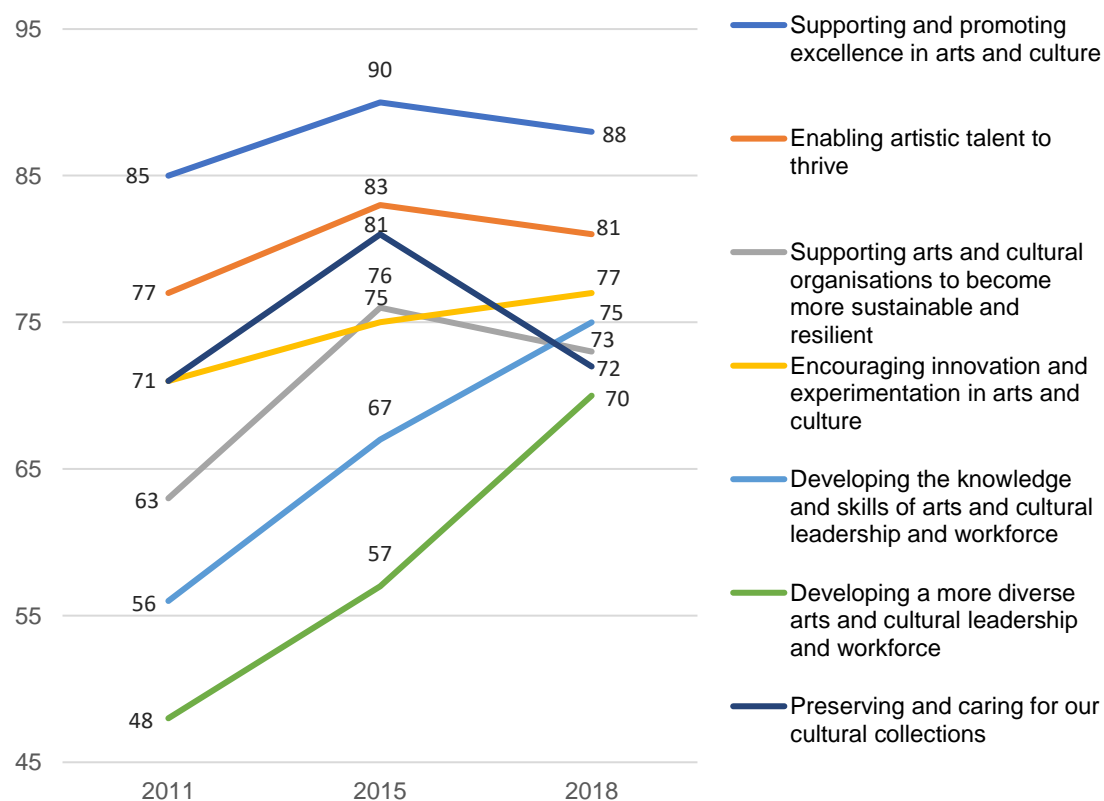
Figure 25. Views on Arts Council's impact on the wider public



(Base: All respondents, N = 982)

Compared to 2015, the perceived impact of the Arts Council's work in the arts and culture sector is relatively stable, with more improvements than declines in stakeholder ratings. The timeline below illustrates these developments over the past seven years, using the 2015 survey as a midpoint reference (see Figure 26).

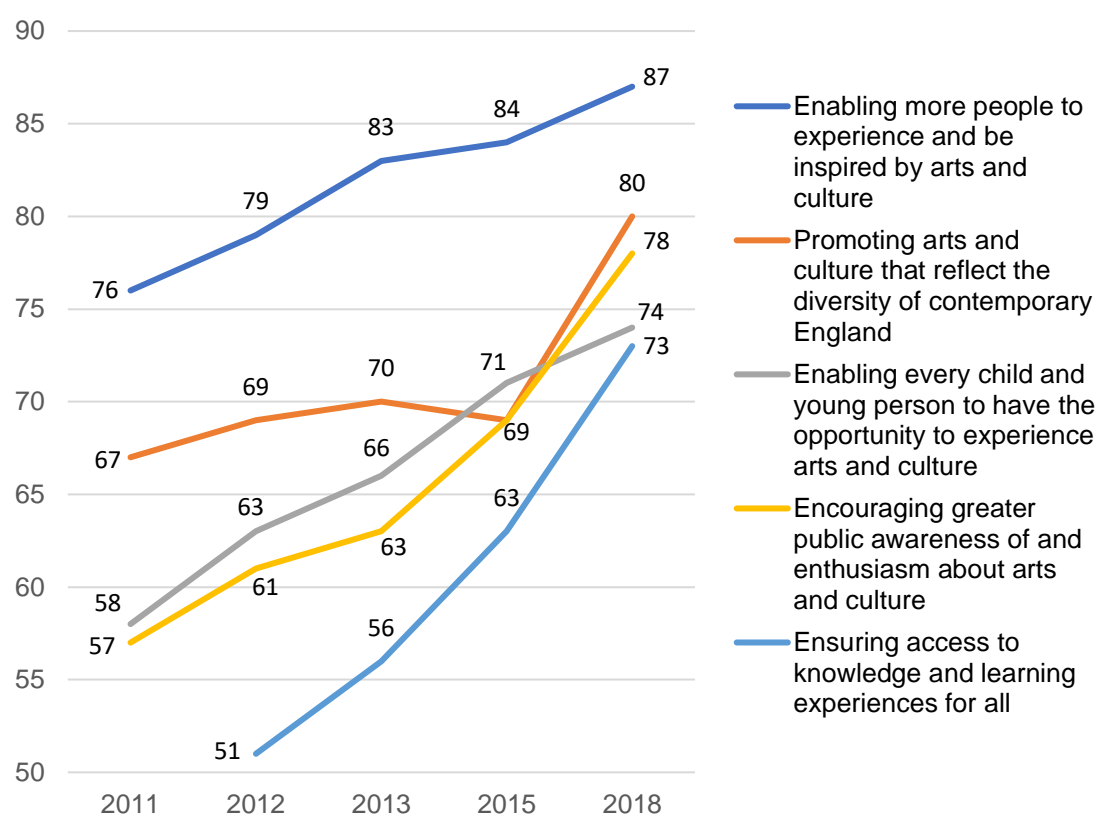
Figure 26. Perceived impact on the arts and culture sector over time (2011-2015-2018)



Improvements over this timeframe include *developing a more diverse arts and cultural leadership and workforce* (2015: 57%, +13%) and developing the latter's *knowledge and skills* (2015: 67%, +8%). A decrease, however, was observed for the Arts Council's function of *preserving and caring for our cultural collections* in 2018 ($n = 572$, 72%), which is down from 81% in 2015 (-9%) and back to 2011 levels (71%, +1%).

Regarding its impact on the general public, the Arts Council's perceived impact has risen in all key areas measured, slightly in some and more substantially in others, continuing the positive trend observed in the previous years' findings (see *Figure 27*).

Figure 27. Perceived impact on the wider public over time



In particular, compared to 2015, increases are evident for the Arts Council's capacity to promote arts and culture that reflect the contemporary diversity of England (2015: 69%, +11%), to ensure access to knowledge and learning experiences for all (2015: 63%, +10%) and to encourage greater awareness and enthusiasm about arts and culture (2015: 69%, +9%).

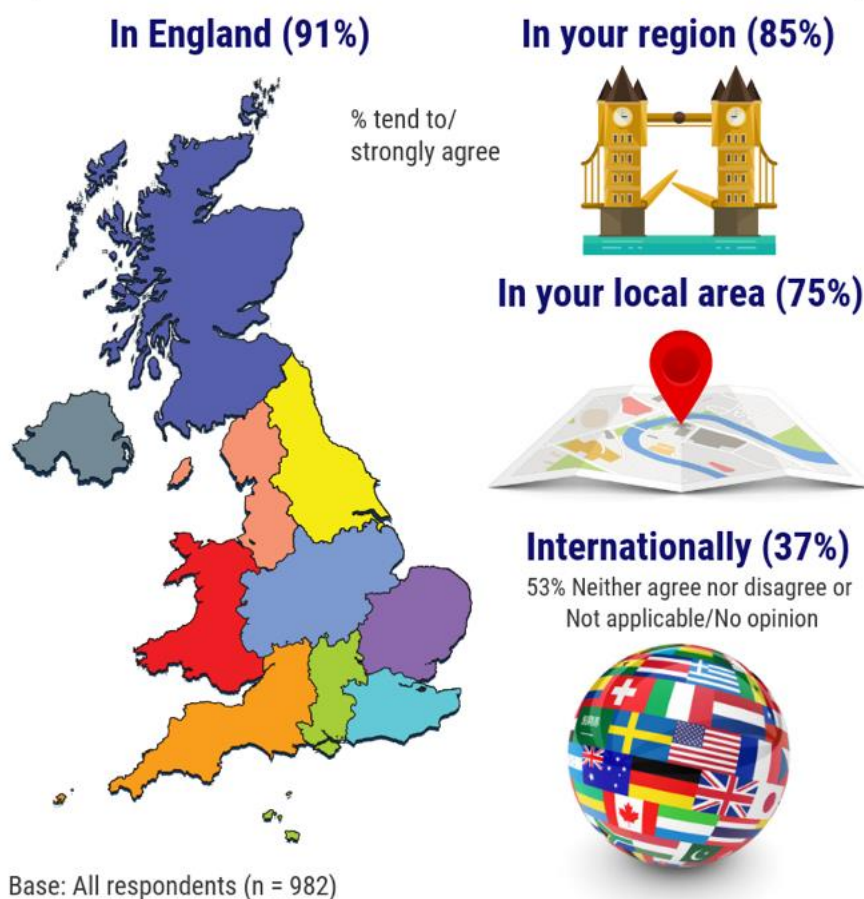
A relatively smaller increase can be observed for the Arts Council's ability to enable inspiring arts and culture experiences for children and young people (2015: 71%, +3%) and people in general (2015: 84%, +3%).

2.3.2 Regional and national impact

The Arts Council's work aims to provide arts and culture experiences at the local, regional, national and international level. With England's international reputation as a world centre for artistic excellence at stake, making a positive difference on all levels, from local to international is crucial. Arts Council stakeholders overwhelmingly agree that the organisation has its greatest impact at the national level (see *Figures 28 and 29*).

Figure 28. Arts Council's regional and national impact

Does the Arts Council make a positive difference to arts and culture?



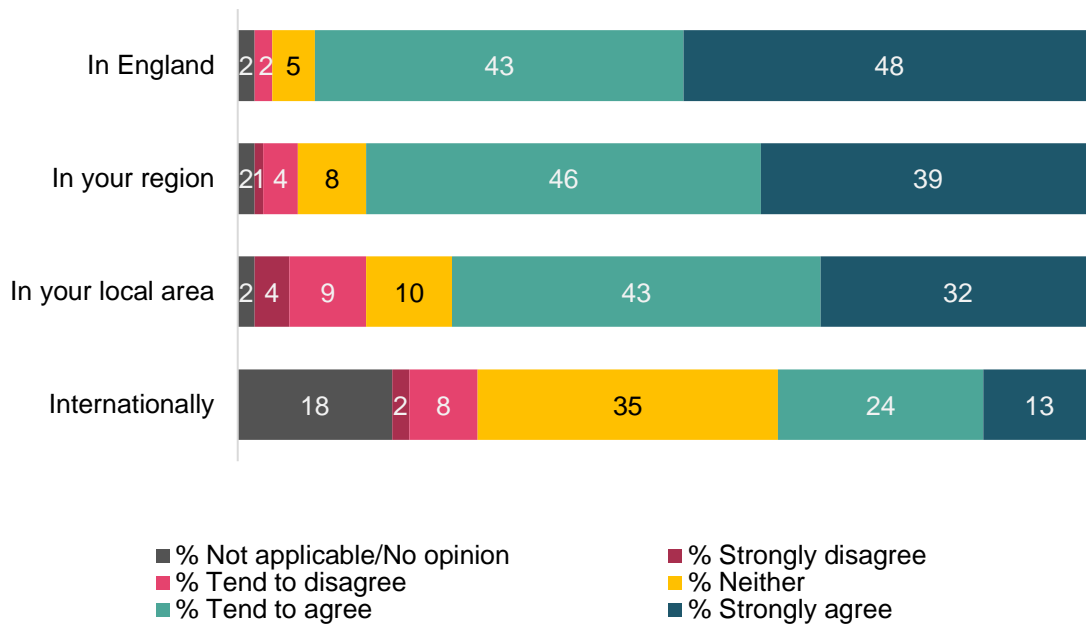
Stakeholders widely agree that the Arts Council makes a positive difference in **England** ($n = 766$, 91%), with most indicating that they *strongly agree* ($n = 402$, 48%).

To a lesser extent, stakeholders are also positive about the Arts Council's work in their region and in their local area. Most believe the Arts Council makes a positive difference to arts and culture in their **region** ($n = 713$, 85%), while three quarter indicate this to be the case of their **local area** ($n = 634$, 75%).

Stakeholders are least likely to report that the Arts Council makes a positive difference to arts and culture **internationally** ($n = 308$, 37%). However, this perception relates mainly to the fact that many stakeholders are unable to express an opinion in this area, with a large share of stakeholders reporting they *neither agree nor disagree* ($n = 291$, 35%) or that they *do not know or have no opinion* ($n = 145$, 18%).

Most stakeholders indicate that the Arts Council makes a positive difference in their region ($n = 709$, 85%). This is a small increase from 2015 findings (2015: 80%, +5%).

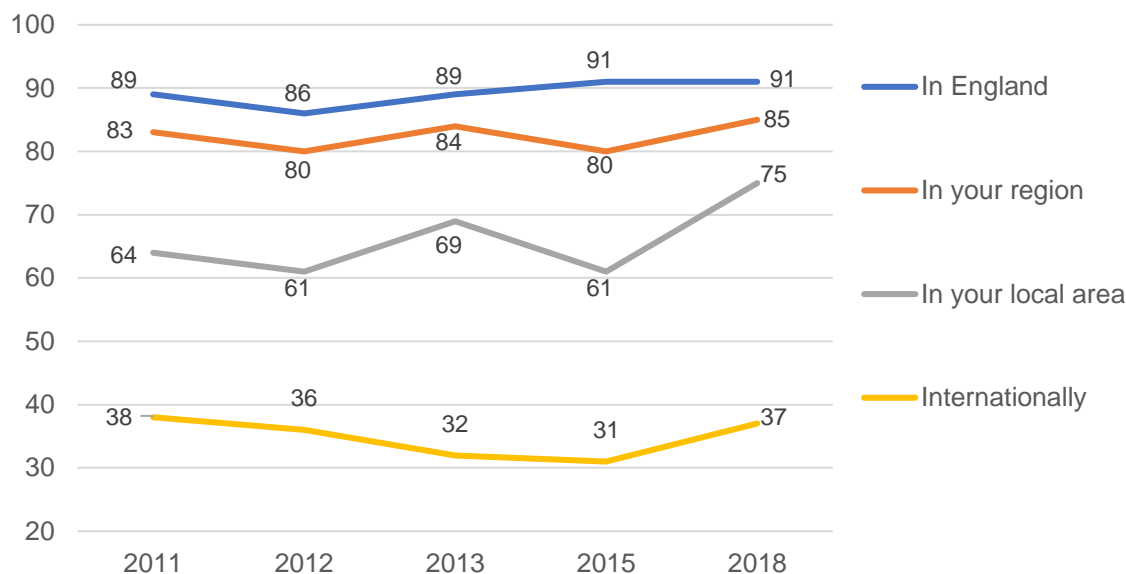
Figure 29. Arts Council's regional and national impact



(Base: All respondents, N = 982)

In terms of impact over time, there has been no significant change in the Arts Council's perceived impact nationally, with figures staying at a high level (+0%, see *Figure 30*). An increase is evident for the Arts Council's impact internationally (+6%), returning to 2011/2012 levels (38/36%), indicating that the Arts Council's international reputation has somewhat recovered. The highest increase, however, has occurred in the local area category (2015: 61%, +14%), suggesting that the Arts Council has improved substantially on stakeholders view that it is making a positive difference locally.

Figure 30. Arts Council's national and regional impact over time



Stakeholders related to children and young people are most likely to feel that the Arts Council has a positive impact on arts and culture across the country, with a majority indicating the Arts Council makes a positive difference in England ($n = 49$, 94%). Arts organisations ($n = 519$, 93%) and Arts individuals ($n = 99$, 92%) are also more likely to report this to be the case.

Very few stakeholders question the Arts Council's positive impact on the arts and culture ecology across the country, with only a small proportion of stakeholders disagreeing that the organisation makes a positive difference in England ($n = 17$, 2%).

A strong, statistically significant, association emerges between favourability towards the Arts Council and perceptions of impact on all levels, from the local to global²⁷.

On a national level, even among stakeholders who are less favourable towards the Arts Council, a majority indicate that it makes a positive difference, even if to a significantly lesser extent than among those who are favourable. That is, among unfavourable stakeholders, almost half report the Arts Council makes a positive difference in England ($n = 22$, 44%), while only a quarter disagree ($n = 12$, 24%). In contrast, among favourable stakeholders, almost all agree that the Arts Council makes a positive difference ($n = 600$, 97%), representing a statistically significant difference²⁸.

²⁷ Local: Chi-squared: $\chi^2(16) = 328.6$, $p < .001$, Regional: $\chi^2(16) = 324.4$, $p < .001$, National: $\chi^2(16) = 367.6$, $p < .001$ and International: $\chi^2(16) = 183.1$, $p < .001$

²⁸ Unweighted proportions differ significantly at $\alpha = 0.05$

Similarly, statistically significant associations are evident based on stakeholders' level of advocacy²⁹. On a national level, a majority of critics indicate the Arts Council makes a positive difference to arts and culture in England ($n = 64$, 70%), while relatively few disagree ($n = 11$, 12%). Among those who would speak highly of the Arts Council, a significantly greater proportion report a positive difference ($n = 500$, 97%)³⁰.

As with other impact measures, beliefs regarding the Arts Council's impact on a local level vary markedly based on a regional level. Stakeholders in the North East ($n = 41$, 95%), West Midlands ($n = 58$, 94%) and London ($n = 191$, 89%) are most likely to report the Arts Council makes a positive difference in their region. In London, nearly half of stakeholders strongly agree that the Arts Council makes a positive difference in their region ($n = 99$, 46%). Whereas in 2015, stakeholders in the West Midlands (68%) were least likely to report the Arts Council makes a positive difference in their region, this has changed drastically in the current report, as described earlier.

Perceptions of the Arts Council's impact on a regional level are closely tied to stakeholders' level of familiarity the Arts Council³¹. Those who know the Arts Council and its work *very well* are significantly more likely to *strongly agree* that it makes a positive difference in their region ($n = 102$, 54%), compared to those who know it *fairly well* ($n = 192$, 38%) or *not very well* ($n = 31$, 27%)³².

Familiarity is also a significant factor when it comes to stakeholder views about the Arts Council's impact in the local area³³. Stakeholders who report knowing the Arts Council *very well* are significantly more likely to report it makes a positive difference in their local area ($n = 91$, 48%) compared to those who know it *fairly well* ($n = 160$, 32%) or *not very well* ($n = 20$, 17%)³⁴.

²⁹ *Local*: Chi-squared: $\chi^2(16) = 280.8$, $p < .001$, *Regional*: $\chi^2(16) = 207.8$, $p < .001$, *National*: $\chi^2(16) = 213.6$, $p < .001$ and *International*: $\chi^2(16) = 120.8$, $p < .001$

³⁰ Unweighted proportions differ significantly at $\alpha = 0.05$

³¹ Chi-squared: $\chi^2(12) = 58.4$, $p < .001$

³² Unweighted proportions differ significantly at $\alpha = 0.05$

³³ Chi-squared: $\chi^2(12) = 59.1$, $p < .001$

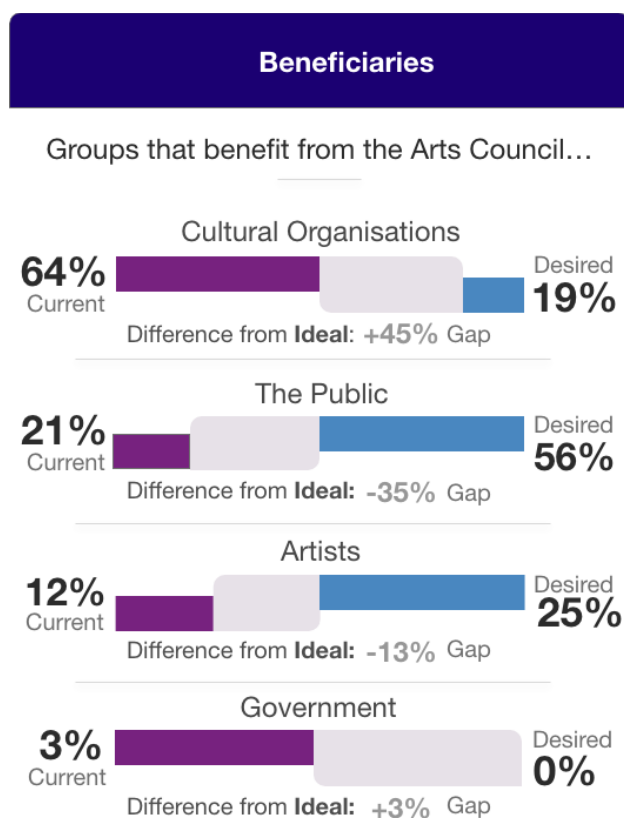
³⁴ Unweighted proportions differ significantly at $\alpha = 0.05$

2.3.3 Beneficiaries

The Arts Council's influence reaches beyond the boundaries of arts individuals and arts organisations to include government stakeholders, such as local authorities, public institutions, such as non-NPO museums and libraries, and of course, the general public. Reflecting this variety of audiences, stakeholders were asked to identify which of these different groups does and should benefit from the Arts Council's work.

As in previous Stakeholder Focus Research results, there is a gap between which groups stakeholders feel *should* and actually *do currently* benefit most from the Arts Council's work. When considering which groups *currently* benefit most from the Arts Council's work (see *Figure 31*), the majority of stakeholders believe that *cultural organisations* are the main beneficiaries ($n = 471, 64\%$). However, when asked who *should* benefit most, most believe the *general public* should be the main beneficiary ($n = 417, 56\%$).

Figure 31. Current versus ideal Arts Council beneficiaries



(Base: All respondents, $N = 982$)

The *general public* is identified by stakeholders as the group that *should* be the primary Arts Council beneficiary ($n = 417, 56\%$), a lower proportion when compared to 2015 (63%, -7%) and 2013 (61%, -5%). However, a lower proportion of stakeholders indicate that the public does *currently* benefit most ($n = 154, 21\%$), a substantial decrease compared to 2015 findings (31%, -10%).

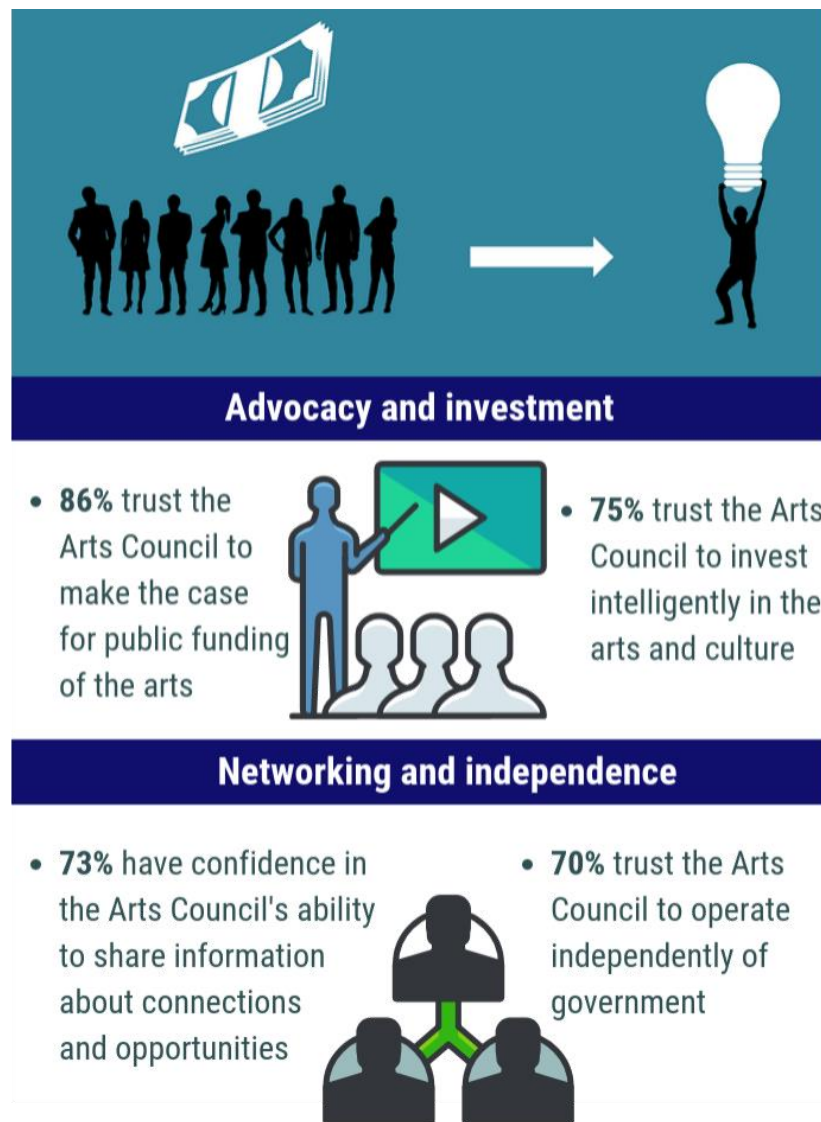
As in previous years, a gap exists with regard to *cultural organisations*. Cultural organisations often receive funds by the Arts Council directly and therefore benefit is more apparent. However, only a minority of stakeholders report that these organisations *should* be the primary beneficiaries of the Arts Council's work ($n = 134$, 18%), while a majority indicate that these organisations *currently* benefit most ($n = 471$, 64%). This is a greater proportion in percentage-point terms compared to previous years (2015: 54%, +10%), suggesting that stakeholders perceive a stronger bias towards arts organisations.

Fewer stakeholders report that *individual artists* should benefit most from the Arts Council's work ($n = 180$, 25%). Overall, a minority of stakeholders report that individual artists currently benefit most ($n = 86$, 12%), despite being a slightly higher proportion when compared to 2015 (9%, +3%).

2.4 Trust

The Arts Council seeks to be a trusted stakeholder within the arts and cultural sector. In this regard, stakeholders show high levels of trust in the Arts Council's advocacy role and confidence in investment decisions (see *Figure 32*).

Figure 32. Stakeholders' trust in the Arts Council

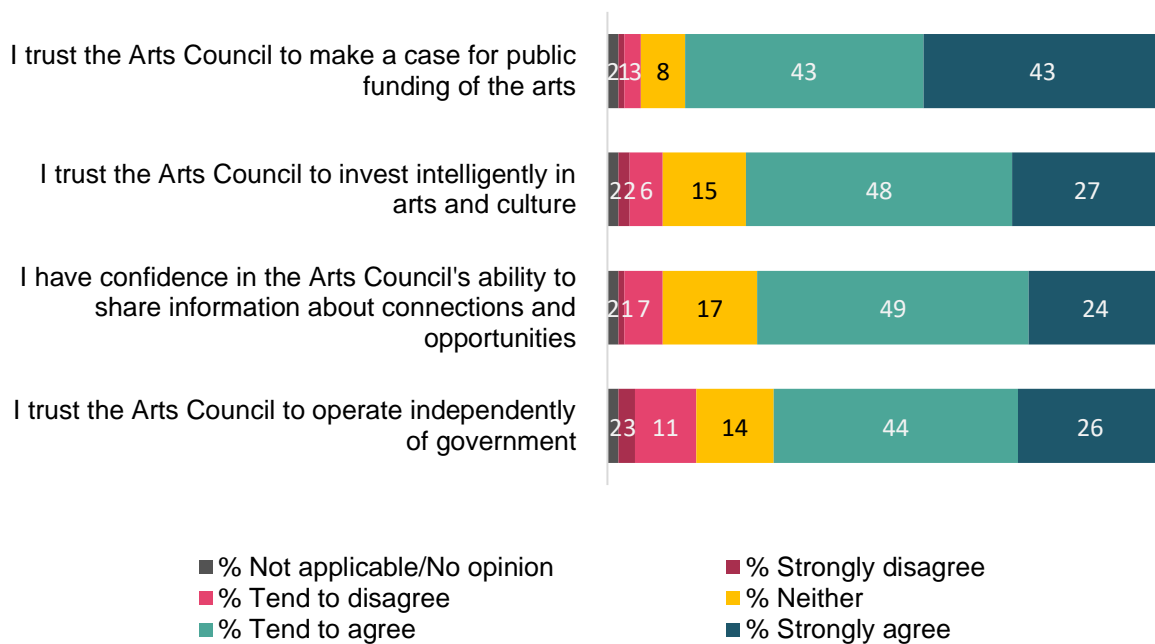


The Arts Council strives to maintain a strong relationship with its stakeholders that is built on mutual trust and a common understanding of the arts and culture. On a general level, the Arts Council is perceived as a trusted stakeholder and worthy representative of the arts and culture sector. The majority of stakeholders indicate they trust the Arts Council to *make the case for public funding of arts and culture* ($n = 649$, 86%; 2015: 84%, +2%), and a substantial proportion even strongly agree ($n = 325$, 43%, see *Figure 33*).

Furthermore, most report they trust the Arts Council to invest to support England’s arts and culture ecology in an intelligent way (n = 585, 75%; 2015: 78%, -3%) and have confidence in the Arts Council’s ability to share information about connections and opportunities (n = 547, 73%; 2015: 67%, +6%). Although the Arts Council is generally thought to perform well on all trust indicators, a minority of stakeholders express some concern and less agreement.

In particular, there is some doubt around the Arts Council’s relation to government, with some stakeholders indicating they do not trust the Arts Council very much to *operate independently of government* (n = 105, 14%; 2015: 19%, -5%).

Figure 33. Stakeholders' trust in the Arts Council



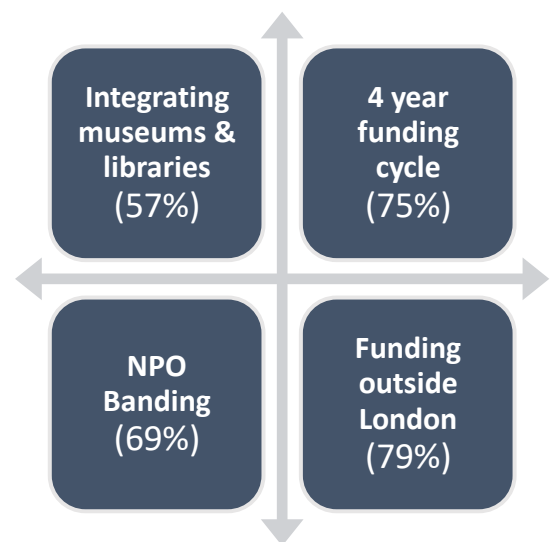
**INVESTMENT AND
FUNDING PROCESSES**



3. Investment and funding processes

This chapter focuses on stakeholders' views of the Arts Council's investment decisions and funding processes. The sections that follow highlight perception how the Arts Council invests public money, fairness and transparency of funding and monitoring processes, and finally, how views on funding processes differ among various stakeholder groups.

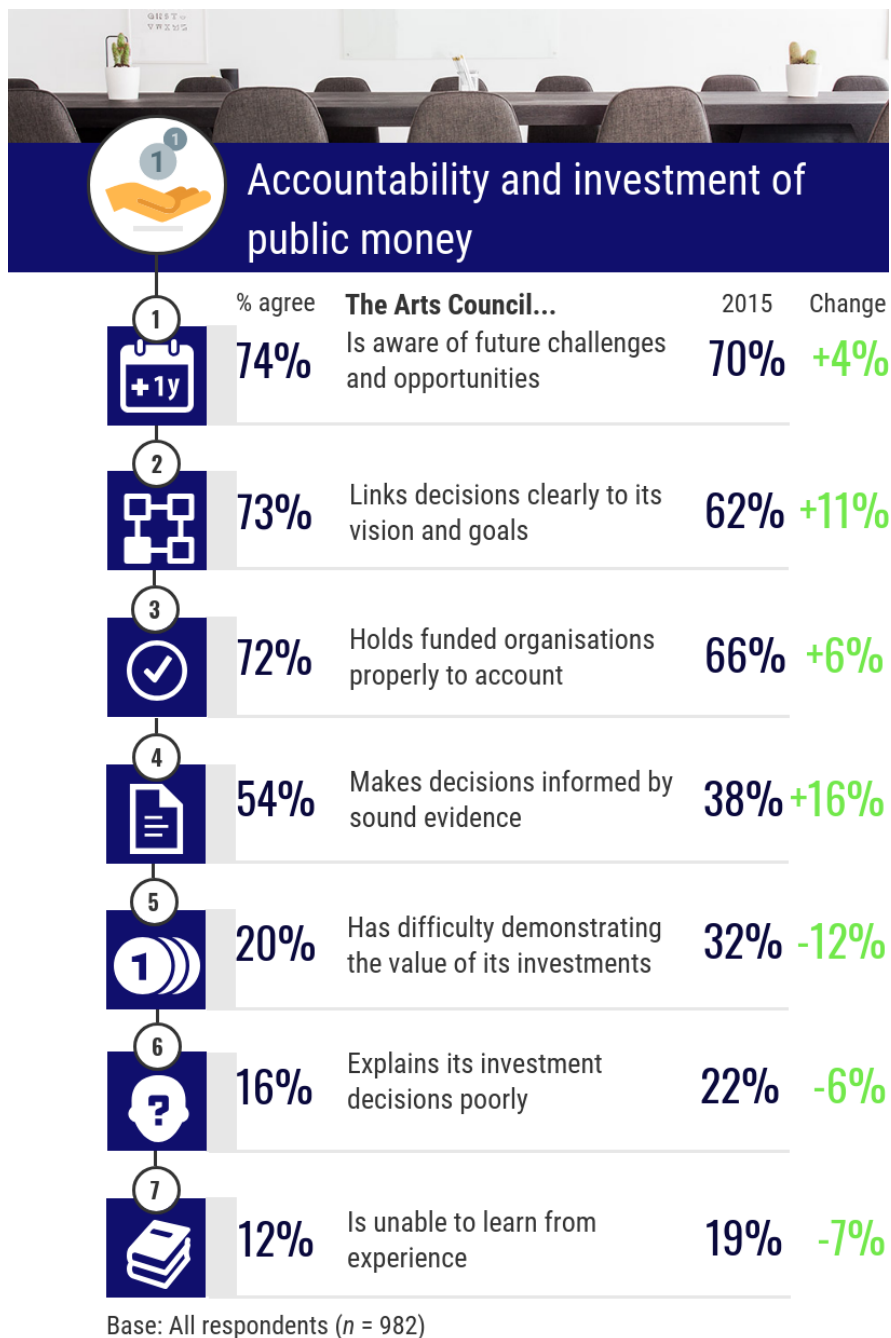
There were four key changes introduced into the National Portfolio 2018-22 investment cycle. Most stakeholders agree that the changes from a **3 to 4-year funding cycle** ($n = 756$, 75%), **introduction of banding for NPOs** ($n = 685$, 69%), and rebalancing **funding outside of London** ($n = 809$, 79%) will make a *positive* difference in this investment cycle. Comparatively, there is less agreement that integrating **museums & libraries into the National Portfolio** ($n = 738$, 57%, $\bar{x} = 3.63/5$) will make a *positive* difference.



3.1 Accountability and investment of public money

This section gauges the stakeholder views of on the Arts Council's effectiveness in its responsibility for investing public money. As an investor of public funds, perceptions of accountability and trustworthiness are particularly important factors in the Arts Council's performance. Overall, improvements in all measures are evident, compared to 2015 findings (see *Figure 34*).

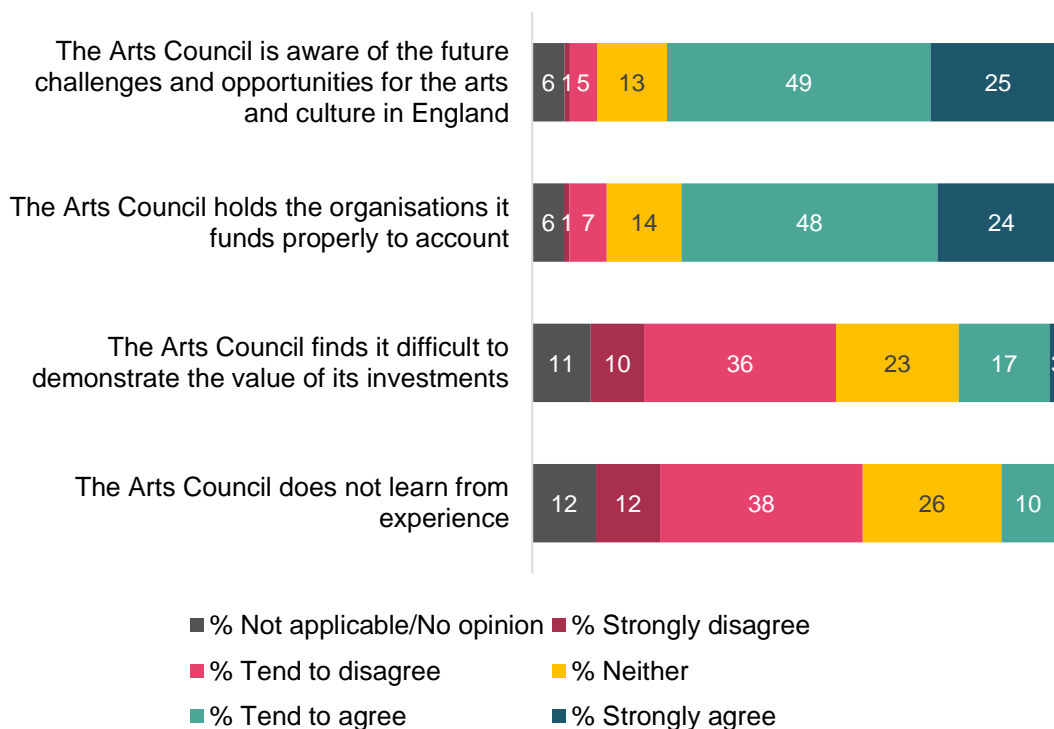
Figure 34. Perceived Arts Council accountability and trustworthiness



3.1.1 Overall views on public investments

Stakeholders indicate positive views about the Arts Council's performance in this area of responsibility for the arts and culture in England (see *Figure 35*). In this regard, the majority stakeholders agree that the Arts Council is *aware of the future challenges and opportunities* ($n = 556, 74\%$) and the Arts Council monitors the use of its funding, by holding *funded organisations properly to account* ($n = 543, 72\%$).

Figure 35. Overall views on public investment



(Base: All respondents, $N = 982$)

However, stakeholders also indicate room for improvement in their assessments of Arts Council performance. While stakeholders indicate a positive perception (disagreement) about whether the Arts Council *learns from experience* ($n = 372, 50\%$), a notable portion have a negative perception (agreement) that the Arts Council *does not learn* ($n = 82, 12\%$).

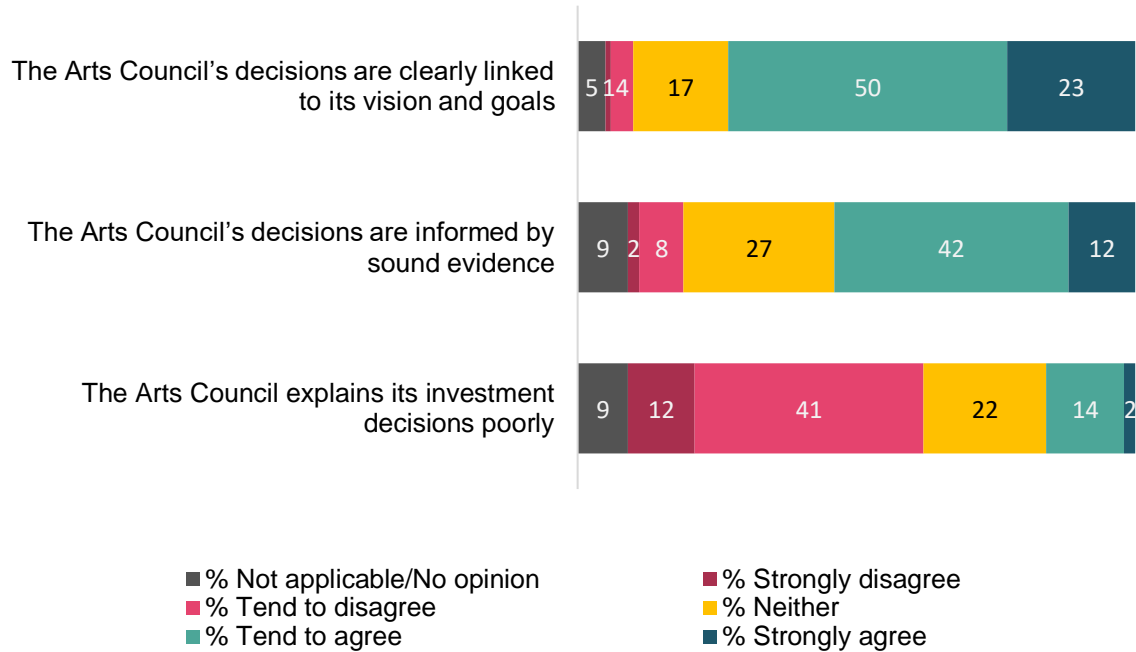
Findings suggest that *familiarity with the Arts Council* relates to perceptions that *value is demonstrated in investments*³⁵. Also, stakeholders who indicate they are *well-informed about the Arts Council's work* are more likely to have positive perceptions ($n = 306, 51\%$) than those who report they *do not know the Arts Council well* ($n = 22, 25\%$).

³⁵ Chi-squared: $\chi^2(20) = 92, p < .001$

3.1.2 Views on Arts Council decision-making

Stakeholders hold positive views about the Arts Council performance in transparent and accountable decision-making (see *Figure 36*).

Figure 36. Overall views on Arts Council's decisions



(Base: All respondents, N = 982)

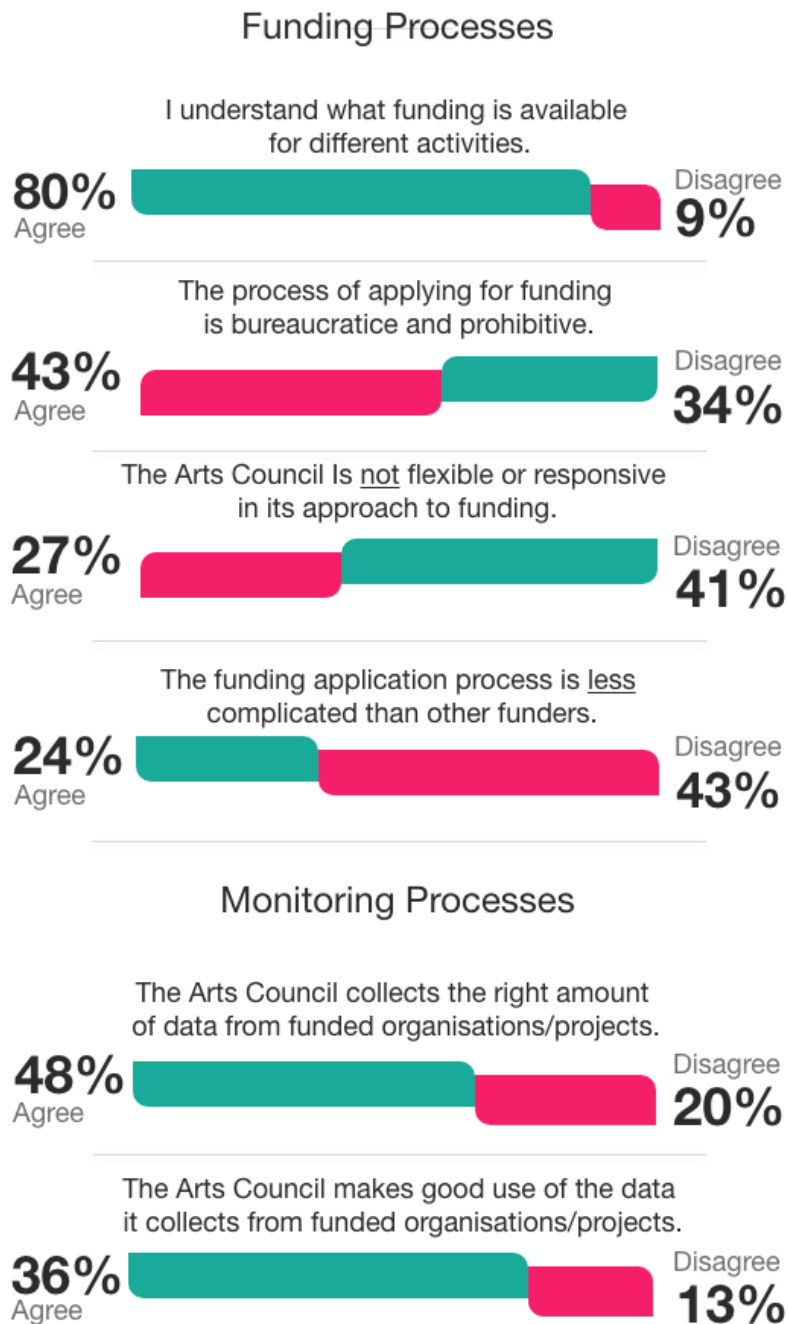
Indeed, most stakeholders agree that investment decisions are clearly linked to the Arts Council's vision and goals (n = 548, 73%). This is an increase from 2015 findings (62%, +11%), representing an improvement on this measure. Additionally, a majority agree that the *decisions are informed by sound evidence* (n = 408, 54%), representing a substantial improvement compared to results from 2015 (38%, +16%).

While many stakeholders agree with a negative perception that the Arts Council *explains its investment decisions poorly* (n = 125, 16%), there is still indication of improvement on this measure due to a proportional decrease compared to 2015 findings (22%, -6%).

3.2 Arts council funding and monitoring processes

The Arts Council invests and monitors public funds in the arts and culture sector. In this regard, stakeholders provide mostly positive assessments of the Arts Council's performance on funding and monitoring processes (see *Figure 37*).

Figure 37. Arts Council funding and monitoring processes

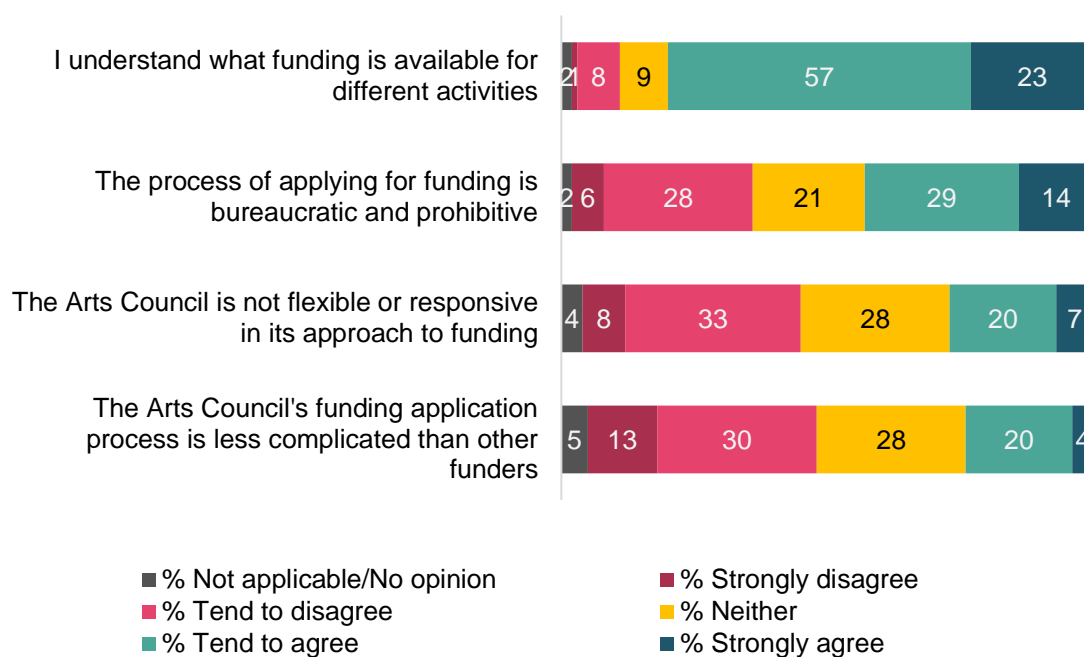


(Base: All respondents, N = 982)

3.2.1 Funding processes

Stakeholders indicate a positive perception and understanding of Arts Council funding (see *Figure 38*). Indeed, the majority of Arts Council stakeholders report that they *understand what funding is available for different activities* ($n = 599, 80\%$).

Figure 38. Stakeholders' views of the funding process



(Base: All respondents, $N = 982$)

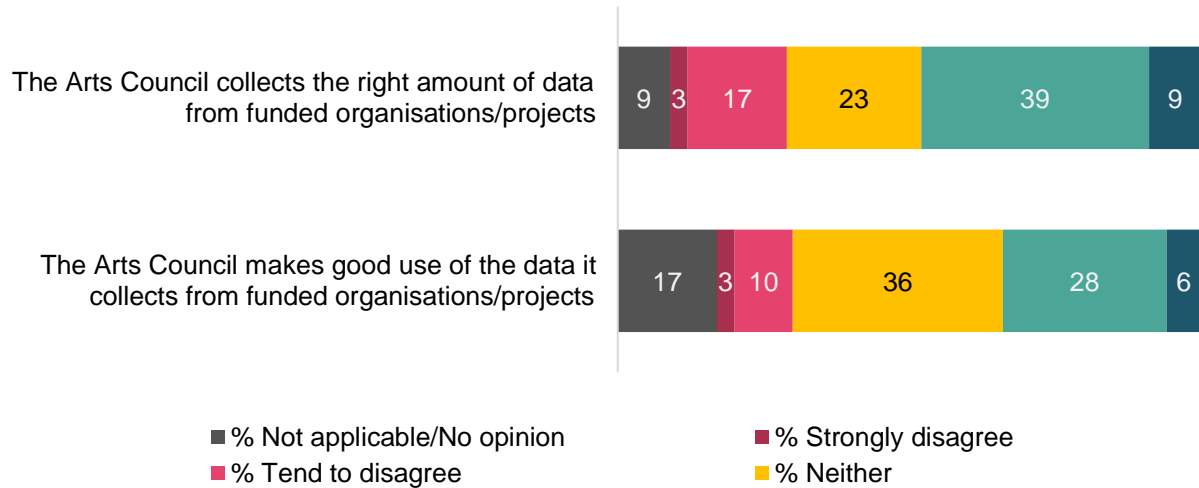
Although the majority indicate positive perceptions (*agreement*) that the Arts Council is *flexible or responsive in its approach to funding* ($n = 303, 41\%$), a large portion of stakeholders also indicate negative perceptions (disagreement) on this measure ($n = 201, 27\%$). Additionally, funding application processes are viewed negatively (*agreement*) as *bureaucratic and prohibitive* ($n = 320, 43\%$), which is an increase from 2015 findings (33%, +10%) and an apparent decline in the Arts Council's performance on this measure. A similar proportion view the Arts Council's funding application process negatively (disagreement) based on the statement that it is *less complex than for other funders* ($n = 321, 43\%$). This also represents an increase from 2015 findings (29%, +14%) and an apparent decline in performance on this measure.

Most stakeholders from arts organisations report an *understanding of available funding* ($n = 440, 85\%$), as well as stakeholders representing CYPs ($n = 36, 78\%$).

3.2.2 Monitoring processes

Overall, stakeholders are split on how effectively the Arts Council collects and uses data from funded organisations and projects. Stakeholders indicate a positive or neutral perception of Arts Council's approach to monitoring funding (see *Figure 39*).

Figure 39. Stakeholders' views of monitoring processes



(Base: All respondents, N = 982)

While many stakeholders indicate agreement that the Arts Council *collects the right amount of data* from funded organisations and projects ($n = 358$, 48%), only a small proportion either disagree ($n = 154$, 20%) or provide neutral views ($n = 172$, 23%).

While only a third of stakeholders agree the Arts Council *makes good use of data it collects* ($n = 255$, 34%), this is a noteworthy increase from the 2015 findings (21%, +13%).

3.3 National Portfolio and Grants for the Arts funding applications

Where applicable, stakeholders were asked about their experiences with funding applications, including the Arts Council's National Portfolio funding programme and 'Grants for the Arts' (GFTA) funding used primarily by arts individuals. This sub-section reports stakeholders' views on the funding application process and Arts Council decision-making processes.

In total, *half of respondents report successfully requesting funds in the past* ($n = 498$, 51%), including 314 (32%) successful NPO applicants and 184 (19%) offered grants (GFTA).

Table 2. Applicant funding results overall

Category	Sample (Percent)
Successful / Offered	498 (51%)
Unsuccessful / Rejected	263 (27%)
No data available	211 (22%)
Total	972 (100%)

Overall, the acceptance rate amongst respondents is higher among NPO applicant respondents ($n = 314$, 74%) compared to GFTA applicant respondents ($n = 184$, 54%).

Table 3. Applicant funding results by category

Status by category	Arts organisation	Arts individual	NPO	GFTA
Successful / Offered	420 (67%)	78 (58%)	314 (74%)	184 (54%)
Unsuccessful / Rejected	207 (33%)	56 (42%)	108 (26%)	155 (46%)
Total	627 (100%)	134 (100%)	422 (100%)	339 (100%)

A statistical analysis of application/grant status³⁶ shows that being in the successful application category and offered grants are significantly predicted by the duration of contact with the Arts Council, with a longer duration of contact significantly increasing the odds of the grant being successful/offered³⁷. In contrast, those with less frequent contact with the Arts Council demonstrated a lower proportion of successful/offered applications³⁸.

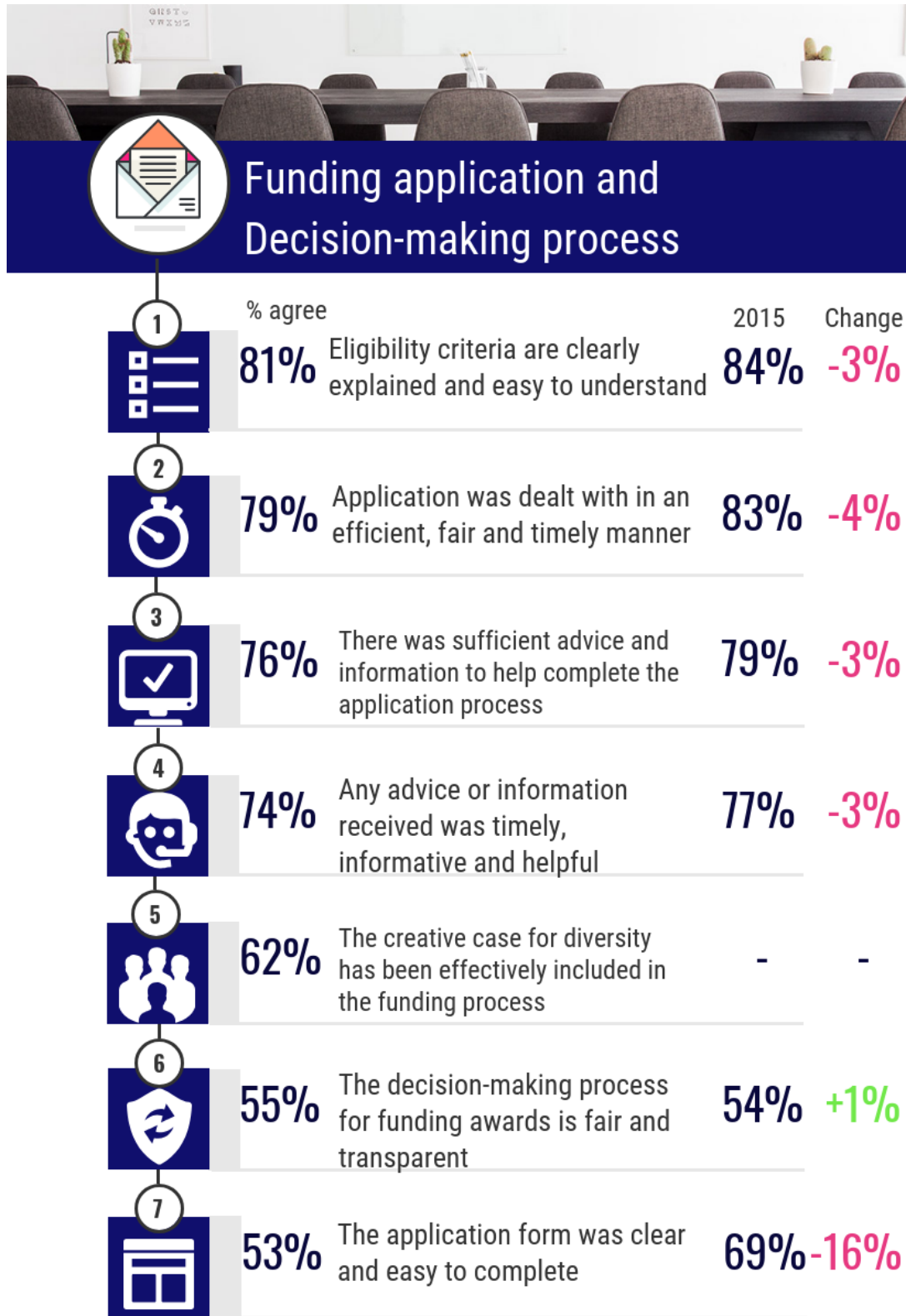
³⁶ Details of the analysis are provided in the *Technical Appendix TA4*.

³⁷ OR = 1.22, $p = .01$

³⁸ OR = 1.72, $p < .001$

Applicants for funding from the Arts Council have an overall positive view of the application process for the funding streams they apply to (see *Figure 40*):

Figure 40. Stakeholder perceptions of the funding and decision-making process



Base: All respondents (n = 982)

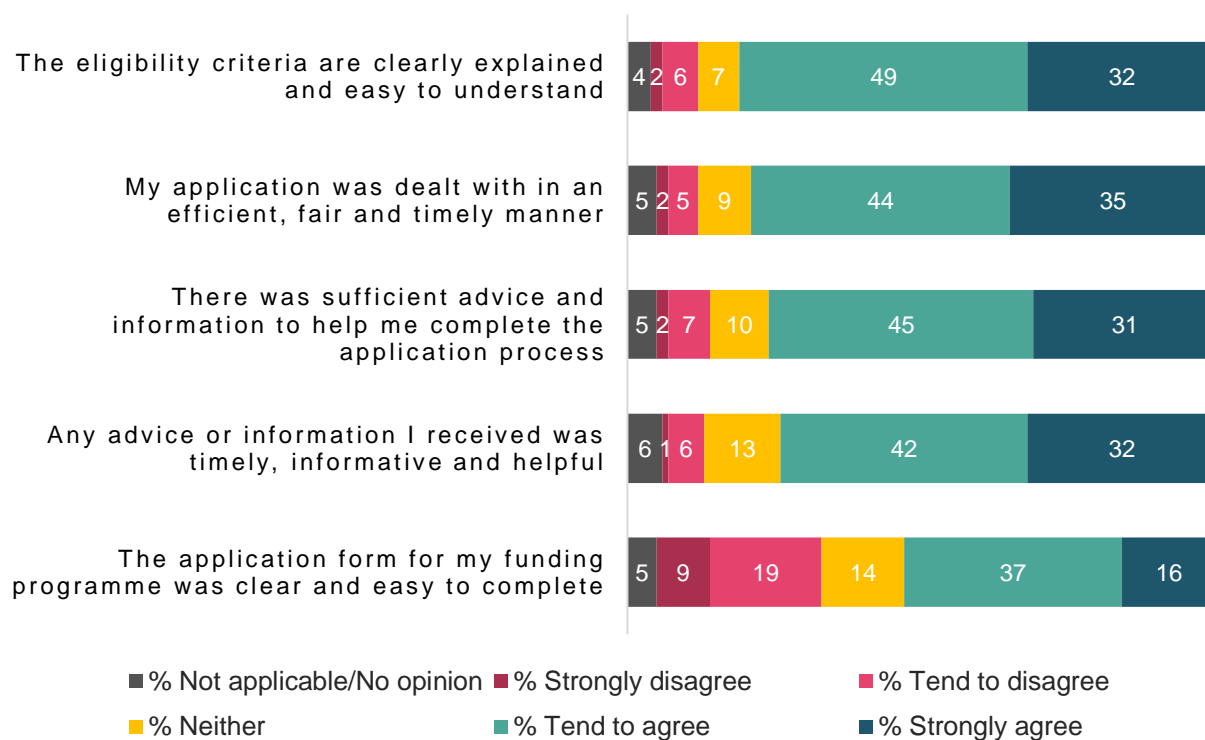
3.3.1 Funding application process

Overall, NPO and GFTA applicants are very positive about the application process for their specific stream of funding³⁹. The majority of stakeholders feel that eligibility criteria are ‘*clearly explained and easy to understand*’ ($n = 609, 81\%$) and that their application was processed in an efficient, fair and timely manner ($n = 591, 79\%$).

Indeed, many *strongly agree* that their application was handled in an ‘*efficient, fair and timely manner*’ ($n = 262, 35\%$), while few disagree ($n = 49, 7\%$, see *Figure 41*).

Stakeholders express a positive assessment of the level of support offered throughout the application process. Most stakeholders indicate that there was ‘*sufficient advice and information*’ to help complete the application process ($n = 570, 76\%$). A similar number report that the advice or information they received was ‘*timely, informative and helpful*’ ($n = 551, 73\%$).

Figure 41. Stakeholder views of the application process



(Base: All respondents, $N = 982$)

³⁹ This survey was undertaken prior to the switch from GFTA to Project Grants, in which efforts have been made by the Arts Council to simplify and clarify application forms.

There is a strong correlation between stakeholders' degree of favourability towards the Arts Council, their advocacy and the extent to which they agree that their application was dealt with in an efficient, fair and timely manner^{40,41}.

A significantly greater proportion of stakeholders who would speak highly of the Arts Council *without being asked* ($n = 120$, 65%) 'strongly agree' that their application was dealt with in an 'efficient, fair and timely manner' compared to stakeholders at lower advocacy levels, including stakeholders speaking highly of the Arts Council only *if asked* ($n = 104$, 38%), being neutral if asked ($n = 25$, 17%) or speaking critically of the Arts Council if asked ($n = 9$, 15%)⁴². Similarly, a significantly larger proportion of those viewing the Arts Council *very favourably* ($n = 97$, 75%) 'strongly agree' that their application was dealt with adequately compared to stakeholders who view the Arts Council *mainly favourably* ($n = 141$, 34%) or with a neutral view ($n = 16$, 15%)⁴³.

Moreover, funding applicants who report *general familiarity* with the Arts Council more often report they receive 'sufficient advice and information' during funding application processes⁴⁴ and that this advice is 'timely, informative and helpful'⁴⁵.

Those who report knowing the Arts Council *very well* are more likely to *strongly agree* that advice was sufficient ($n = 78$, 45%) compared to those who know the Arts Council *fairly well* ($n = 137$, 31%) or *not very well* ($n = 19$, 23%)⁴⁶.

Those reporting strong Arts Council familiarity (*very well*) are also significantly more likely to indicate that the advice or information they receive is 'timely, informative and helpful' ($n = 73$, 42%) compared to relatively fewer taking this positive view among those unfamiliar with the Arts Council (*not very well*, $n = 20$, 24%)⁴⁷.

There is a need to enhance *clarity of the application form*, according to stakeholders. Although more than half of respondents feel the application form for their funding programmes are '*clear and easy to complete*' ($n = 397$, 53%; 2015: 69%, -16%), a substantial minority disagree ($n = 210$, 28%). This represents a notable percentage-point increase in negative views on this measure compared to 2015 (17%, +11%).

⁴⁰ Chi-squared: $\chi^2(16) = 320$, $p < .001$

⁴¹ Chi-squared: $\chi^2(16) = 326$, $p < .001$

⁴² Unweighted proportions differ significantly at $\alpha = 0.05$

⁴³ Unweighted proportions differ significantly at $\alpha = 0.05$

⁴⁴ Chi-squared: $\chi^2(12) = 50.3$, $p < .001$

⁴⁵ Chi-squared: $\chi^2(12) = 52.2$, $p < .001$

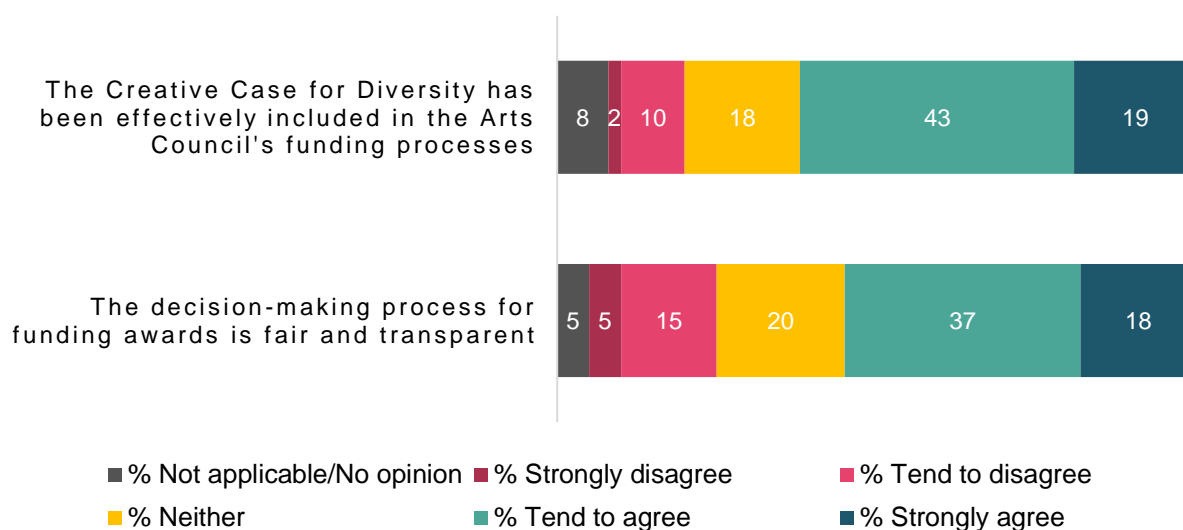
⁴⁶ Unweighted proportions differ significantly at $\alpha = 0.05$

⁴⁷ Unweighted proportions differ significantly at $\alpha = 0.05$

3.3.2 Decision-making process and diversity inclusion

Stakeholders' strongly positive assessment of funding application process does not fully carry over to their views on the decision-making process for awarding funding, with lower levels of positive sentiment and higher levels of negative sentiment (see *Figure 42*). While most applicants report the *decision-making process is fair and transparent* ($n = 414, 55\%$), a substantial minority disagree ($n = 148, 20\%$) and an identical proportion are neutral ($n = 152, 20\%$).

Figure 42. Perceptions of the decision-making process



(Base: All respondents, $N = 982$)

NPO ($n = 208, 58\%$) and Grants for the Arts applicants ($n = 138, 55\%$) are at a similar level of positive sentiment about *decision-making fairness and transparency*. A positive indicator is that compared to 2015 findings (48% positive sentiment on this measure), GFTA applicants are now more likely to perceive the process as fair (+7% increase).

Another key explanatory factor in stakeholder assessments of the fairness and transparency of funding decision-making is the *frequency of contact* an applicant has with the Arts Council⁴⁸. To illustrate, a significantly greater proportion of applicants with more frequent contact (i.e. 2-3 times a month) *strongly agree* that the decision-making process is fair and transparent ($n = 32, 31\%$) compared to those in contact every 2-3 months ($n = 27, 15\%$) or 4-6 months ($n = 15, 14\%$)⁴⁹.

Finally, most stakeholders indicate that the Arts Council has *effectively embedded the Creative Case for Diversity* within the funding process ($n = 471, 63\%$), while relatively few disagree ($n = 83, 11\%$).

⁴⁸ Chi-squared: $\chi^2(35) = 130.3, p < .001$

⁴⁹ Unweighted proportions differ significantly at $\alpha = 0.05$

WORKING RELATIONSHIPS



4. Working Relationships

This section focuses on the working relationships and communication between the Arts Council and its stakeholders. It describes stakeholders' views on the overall effectiveness and quality of working relationships, as well as the channels, reach and effectiveness of Arts Council communications.

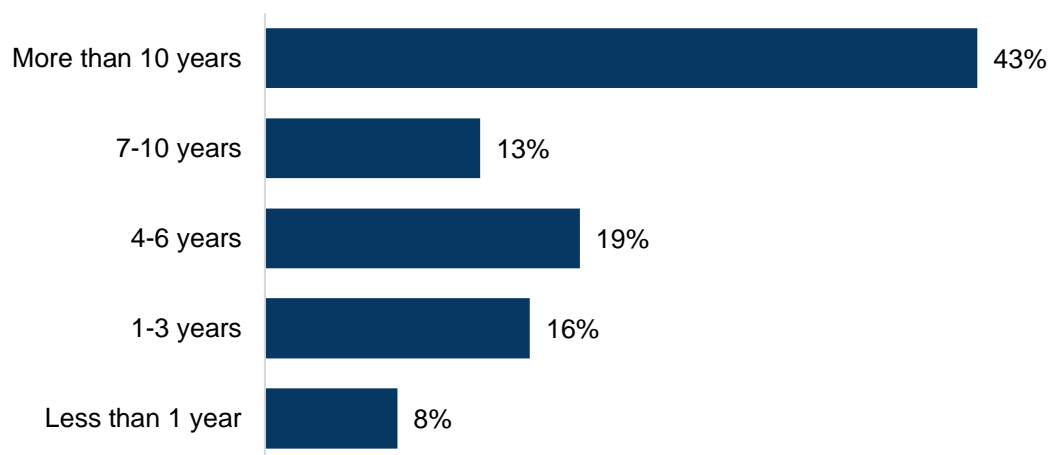
Contact between the Arts Council and National Portfolio Organisations (NPOs) is maintained by relationship managers. Relationship managers are based in regional offices and are the first point of contact for such stakeholders. Other stakeholders, such as Grants for the Arts (GFTA) recipients, do not technically have a relationship manager, but still tend to use that term to talk about their contacts at the Arts Council.

4.1 Length of relationship

In line with previous reports, the majority of stakeholders report an extended history of contact with the Arts Council (see *Appendix 3*).

Most stakeholders report engaging with the Arts Council for 4-6 years or longer ($n = 658$, 75%, see *Figure 43*). In particular, the largest proportion of participating Arts Council stakeholders have been in contact with the organisation for more than 10 years ($n = 377$, 43%), while fewer stakeholders indicate a relationship lasting 7-10 years ($n = 111$, 13%) or 4-6 years ($n = 170$, 19%). Remaining stakeholders have been in contact with the Arts Council for three years or less ($n = 205$, 24%).

Figure 43. Length of relationship with the Arts Council

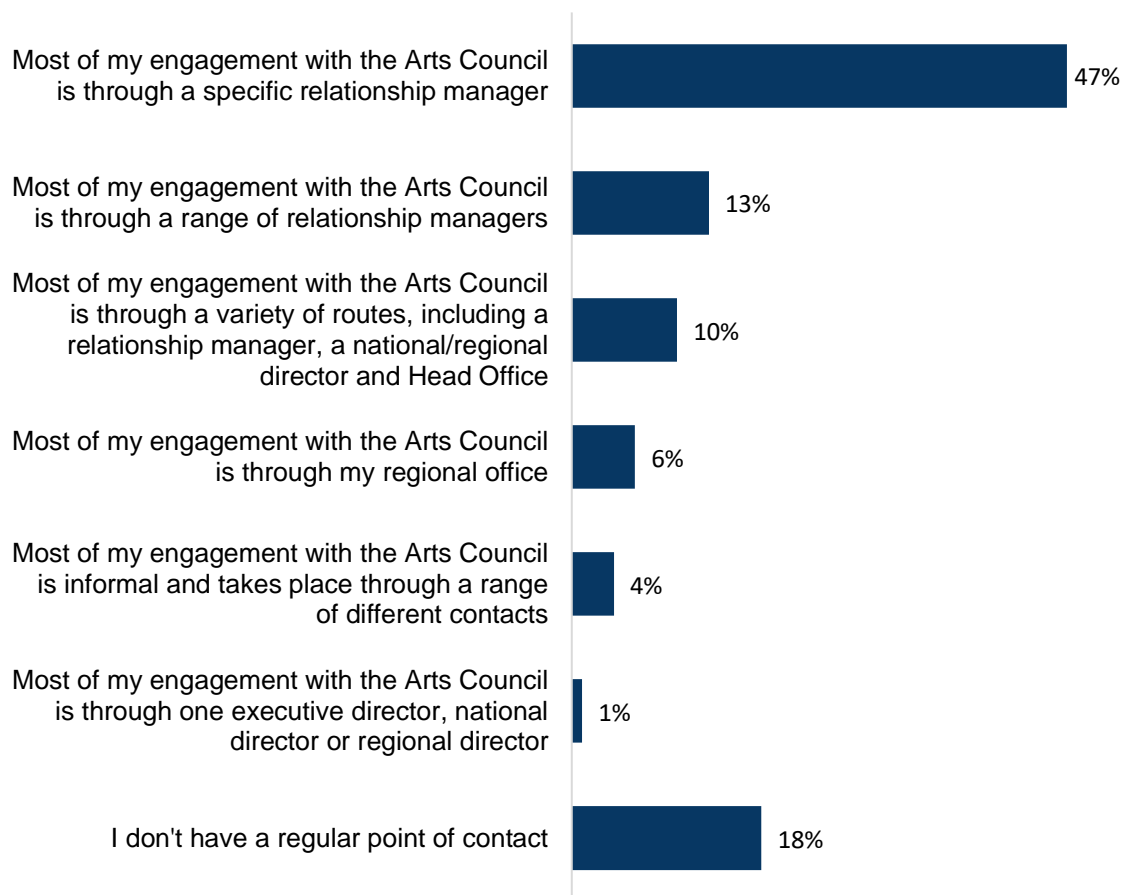


(Base: All respondents, $N = 982$)

4.2 Route of engagement

Stakeholders engage with the Arts Council in many ways (see *Appendix 3*). The most common way to engage with the Arts Council amongst respondents is through a relationship manager. The majority of stakeholders engage with the Arts Council via this route ($n = 585$, 60%). Of those, most rely on a *specific relationship manager* ($n = 383$, 47%), whereas a minority of stakeholders engage with the Arts Council through a *range of relationship managers* ($n = 102$, 13%, see *Figure 44*).

Figure 44. Engagement with the Arts Council



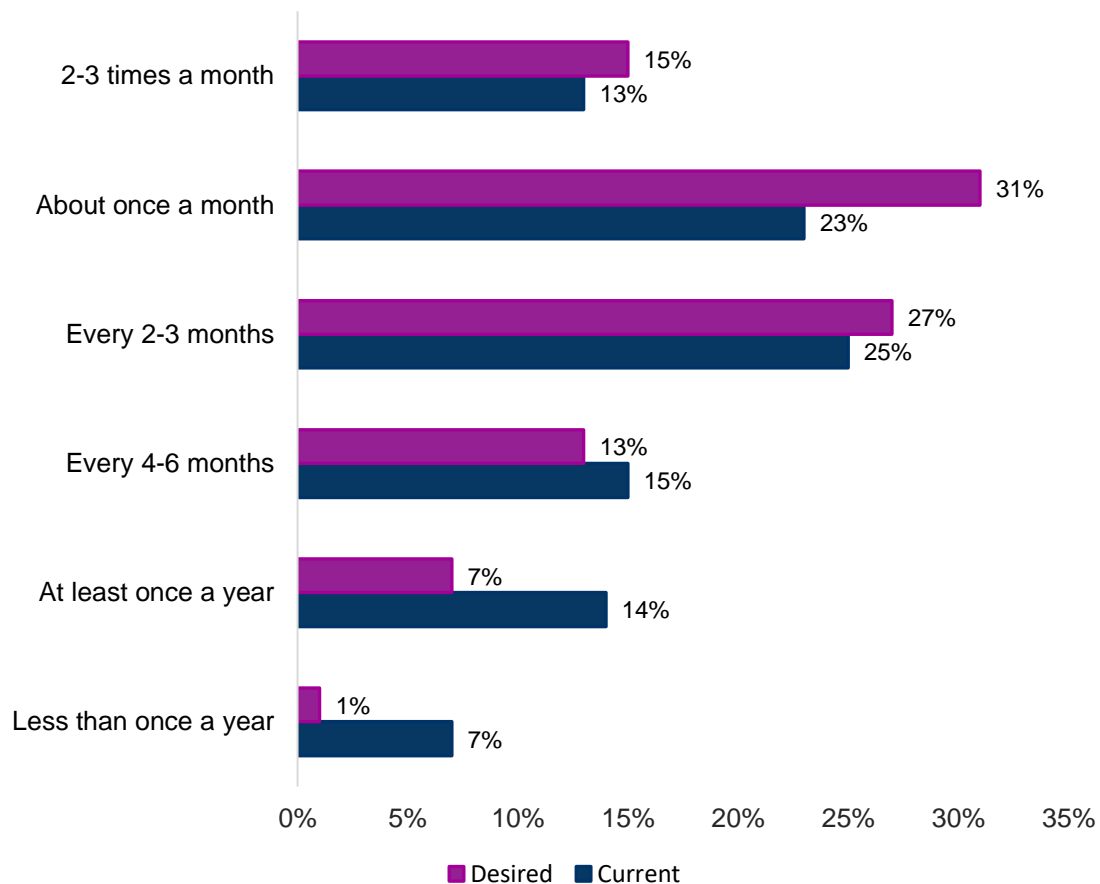
(Base: All respondents, $N = 982$)

In contrast, relatively few stakeholders engage with the Arts Council through their *regional office* ($n = 52$, 6%), *informally through a range of different contacts* ($n = 32$, 4%) or through an *Executive Director, national or regional director* ($n = 10$, 1%). For a minority of stakeholders, contact with the Arts Council involves *several points of contact* including relationship managers, national or regional directors and Head Office ($n = 83$, 10%). Moreover, a substantial proportion of stakeholders *do not have a regular point of contact* ($n = 146$, 18%). Overall, compared to 2015 findings, no major changes are observable in the way stakeholders engage with the Arts Council.

4.3 Preferred frequency of contact

Although three out of four stakeholders have been collaborating with the Arts Council for 4+ years, the frequency of contact widely varies. Overall, most stakeholders engage with the Arts Council at least **once every two to three months** ($n = 497$, 61%; see *Figure 45* and *Appendix 3*), whereby stakeholders are in contact **2-3 times per month** ($n = 105$, 13%), **once per month** ($n = 185$, 23%) and every **two to three months** ($n = 203$, 25%).

Figure 45. Current versus desired frequency of contact

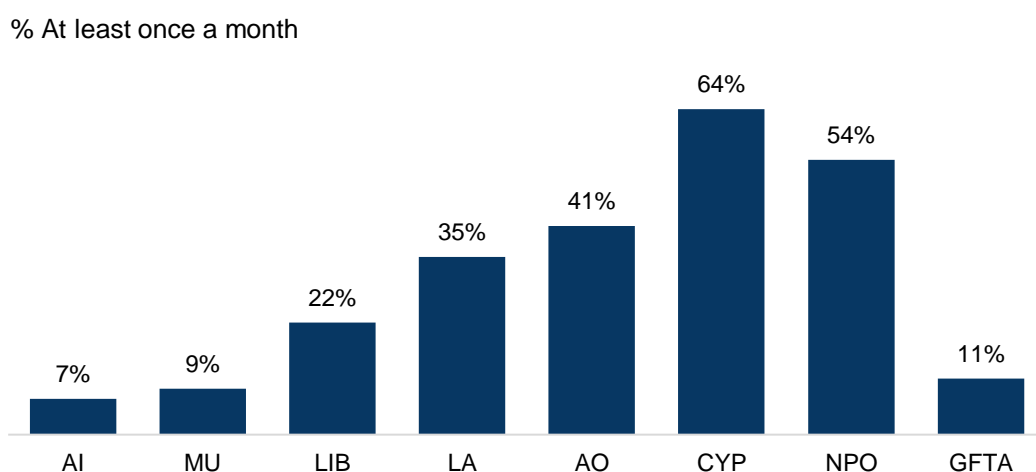


(Base: All respondents, $N = 982$)

On the upper and lower end of the distribution, only a small percentage of stakeholders are in contact with the Arts Council less than once per year ($n = 58$, 7%). Substantial differences in the current frequency of contact are evident for different stakeholder categories (see *Figure 46*). There is also a statistically significant association between the frequency of contact and the type of funding involved⁵⁰.

⁵⁰ Chi-squared: $\chi^2(70) = 457.56$, $p < .001$

Figure 46. Contact at least once a month by stakeholder group



(Base: All respondents, $N = 982$)⁵¹

A significantly greater proportion of NPO stakeholders versus GFTA stakeholders report engaging with the Arts Council 2-3 times a month ($n = 73$, 20% vs $n = 7$, 3%), about once a month ($n = 127$, 35% vs $n = 21$, 8%) or every 2-3 months ($n = 110$, 30% vs $n = 44$, 16%). GFTA stakeholders, in turn, outnumber NPO stakeholders in the lower frequency contact categories of every 4-6 months ($n = 72$, 27% vs $n = 36$, 10%), at least once a year ($n = 80$, 30% vs $n = 19$, 5%) and less than once a year ($n = 41$, 15% vs $n = 2$, 0.5%)⁵².

Taken together, NPO stakeholders are almost five times more likely to be in contact with the Arts Council at least once a month ($n = 201$, 54%) when compared to Grants for the Arts stakeholders ($n = 29$, 11%). This gap has narrowed since 2015, when NPO stakeholders were as much as seven times more likely than GFTA stakeholders to engage with the Arts Council at least once per month (54%/11% 2018; 76%/11% 2015).

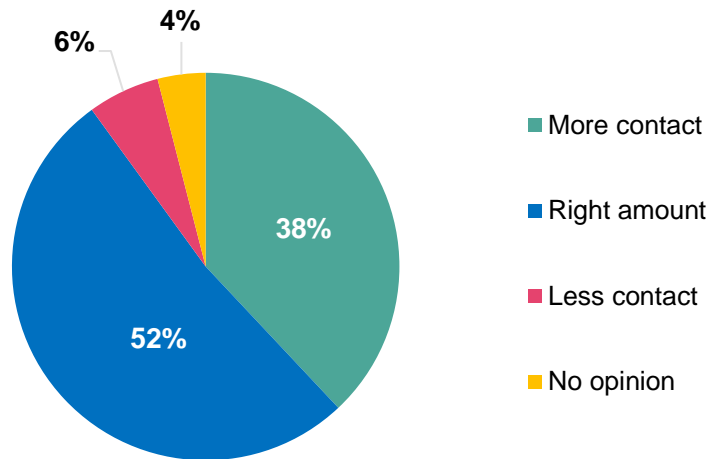
4.3.1 Desired amount of Arts Council contact

Stakeholders were asked about their ideal frequency of contact with the Arts Council with three possible responses: *receiving the right amount of contact* and *desiring more, or less frequent contact* with the Arts Council. Based on these possible responses, a majority of stakeholders ($n = 681$, 90%) report they are either receiving the *right amount of contact* ($n = 393$, 52%) or that they desire *more frequent contact* ($n = 288$, 38%). Very few stakeholders regard their current level of contact with the Arts Council as *too frequent* ($n = 45$, 6%), as shown in Figure 47.

⁵¹ AI = Arts individual, MU = Museums [non NPO], LIB = Libraries [non NPO], LA = Local authorities, AO = Arts organisations, CYP = Children and Young People, NPO = National Portfolio, GFTA = Grants for the Arts

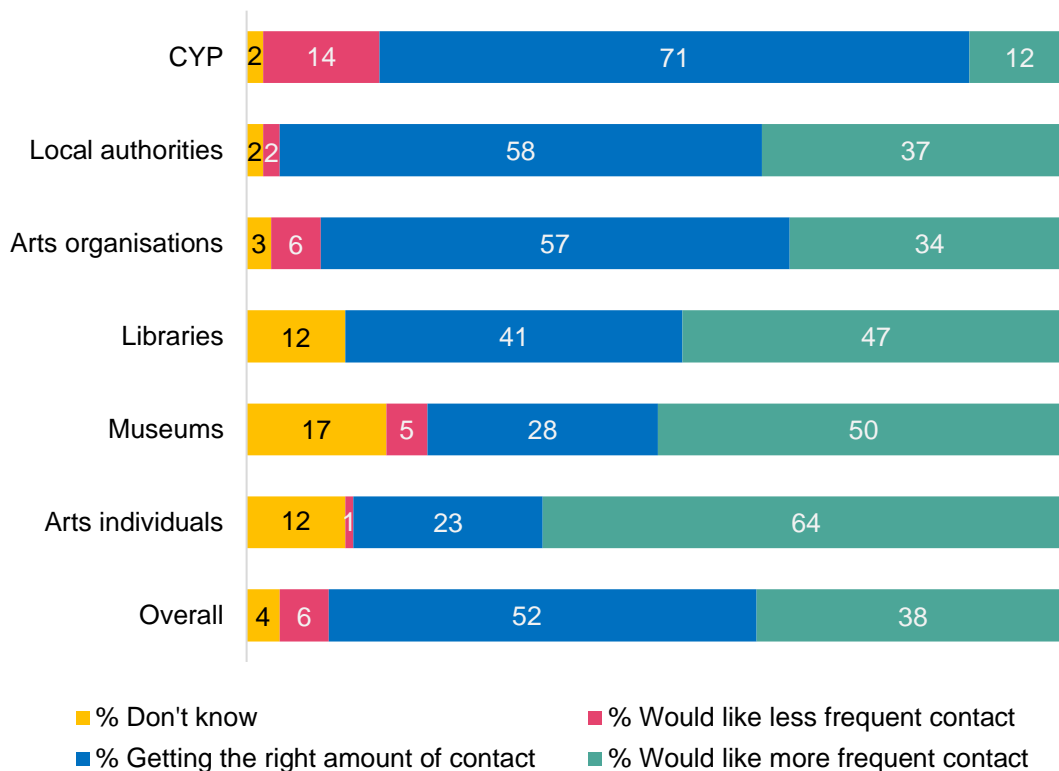
⁵² Unweighted proportions differ significantly at $\alpha = 0.05$

Figure 47. Desired amount of Arts Council contact



Most arts individuals express a desire for more frequent contact (Figure 48).

Figure 48. Desired amount of Arts Council contact



(Base: All respondents, N = 982)

Although the majority of arts organisations and local authorities are satisfied with their current level of Arts Council contact ($n = 288$, 57%, and $n = 25$, 58%, respectively), just over a third in each of these categories ($n = 172$, 34%, and $n = 16$, 37%) would like to have more frequent interactions with the Arts Council in future.

4.4 Quality of working relationships

The 2018 survey research demonstrates that most stakeholders value their working relationships with the Arts Council and appreciate how it engages with stakeholders in this context (see *Figure 49*).

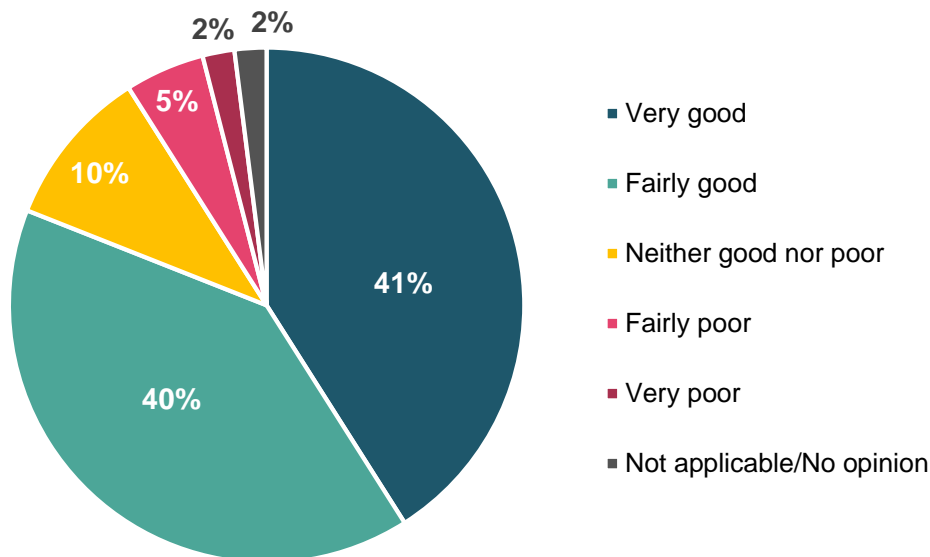
Figure 49. Stakeholder perceptions of working relationship quality and openness



Base: All respondents (n = 982)

The majority of stakeholders are positive about their current working relationship with the Arts Council, indicating their working relationship with the Arts Council is 'good' ($n = 658, 81\%$), while relatively few rate it as 'poor' ($n = 58, 7\%$), as illustrated in *Figure 50*. In fact, many stakeholders rate their working relationship as *very good* ($n = 331, 41\%$).

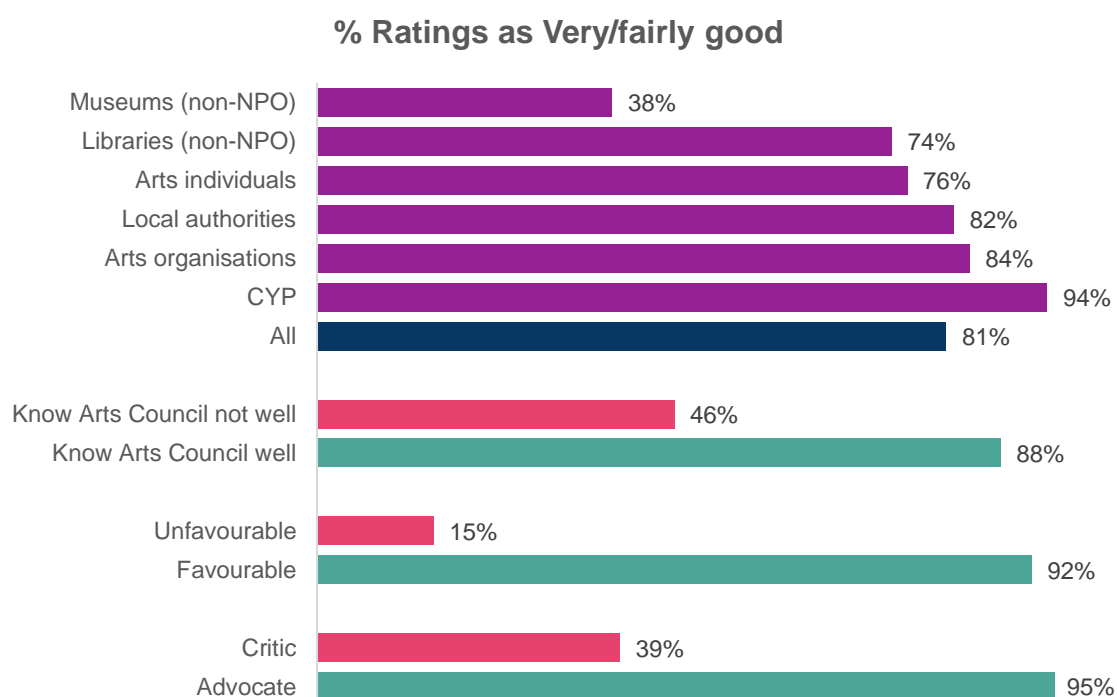
Figure 50. Perceived quality of working relationship



(Base: All respondents, $N = 982$)

However, not all stakeholders are equally satisfied with their working relationship (see *Figure 51*). A statistical analysis of working relationship quality predictors indicates that quality ratings are linked to Arts Council favourability scores (i.e. those who are more favourable towards the Arts Council rate their working relationship quality higher) and familiarity scores (i.e. those reporting they are more familiar with the Arts Council also rate quality higher). At the same time, those who speak more critically of the Arts Council (advocacy) and those who have less frequent Arts Council contact rate their working relationship quality lower. The complete analysis is provided in the **Technical Appendix TA2**.

Figure 51. Quality of relationship by stakeholder group and overall perception



(Base: All respondents, N = 982)

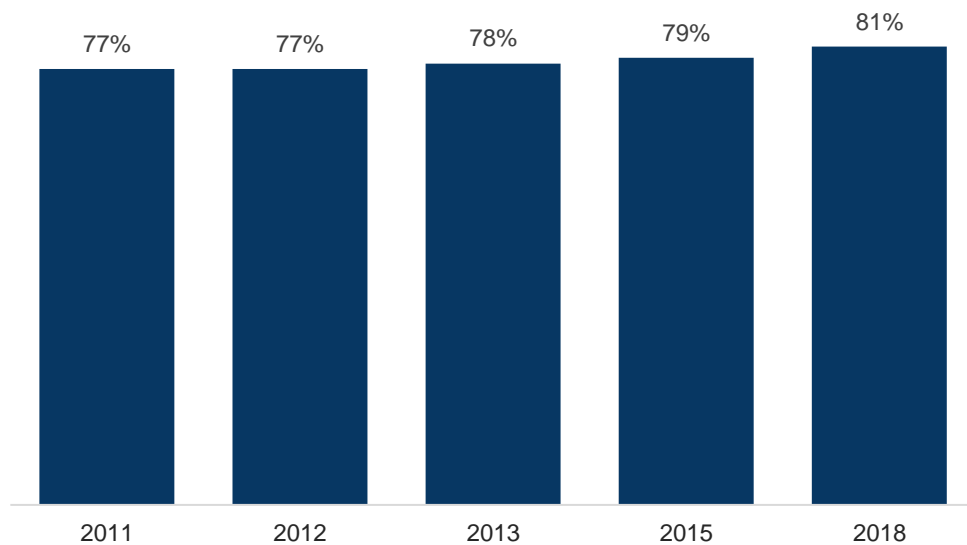
There is a strong positive association between stakeholders' frequency of contact with the Arts Council and their perception of the quality of their relationship⁵³. More specifically, the proportion of those who rate their working relationship quality as *very good* is significantly higher among those in contact 2-3 times a month ($n = 64$, 62%), once a month ($n = 104$, 58%) or every 2-3 months ($n = 75$, 39%) compared to those in contact less than once a year ($n = 6$, 11%)⁵⁴, suggesting that a higher occurrence of contact plays a pivotal role in maintaining good relationships between the Arts Council and its stakeholders.

Over the past seven years, there has been a small, yet consistent, increase in the proportion of stakeholders' expressing satisfaction with their working relationship (see *Figure 52*). In 2018, 81% rate their working relationship with the Arts Council as fairly or very good ($n = 658$), while the proportion was 77% in 2011 (+4%).

⁵³ Chi-squared: $\chi^2(28) = 230.1$, $p < .001$

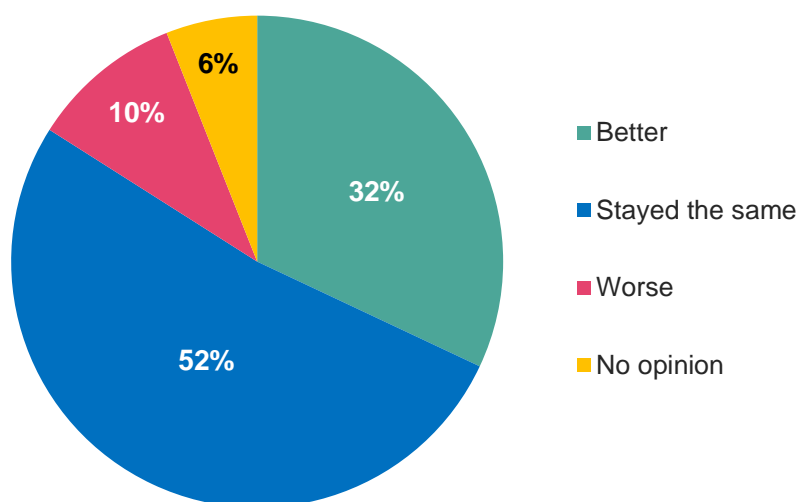
⁵⁴ Unweighted proportions differ significantly at $\alpha = 0.05$

Figure 52. Quality of working relationship over time



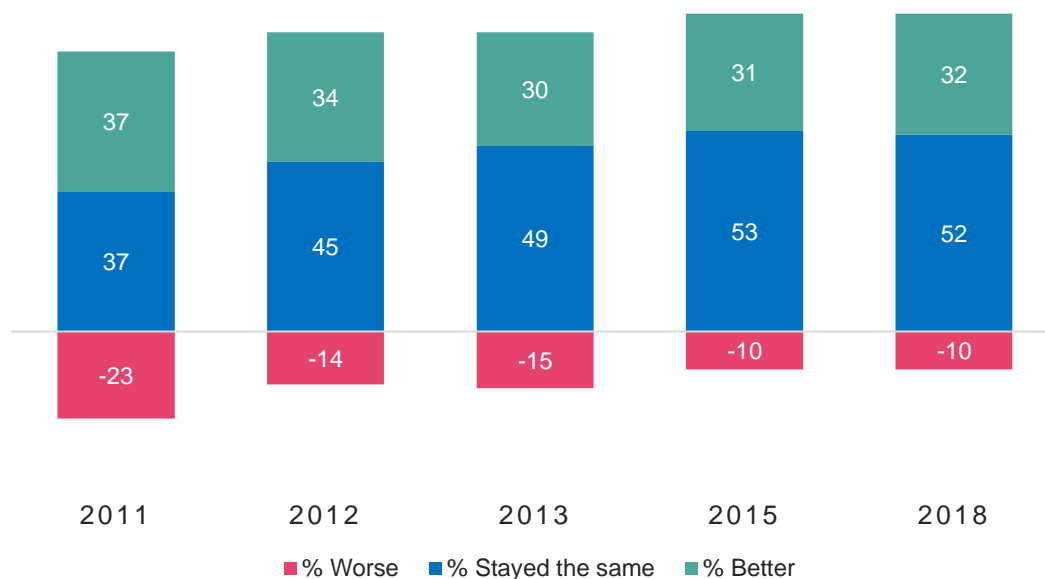
When asked about how their relationship with the Arts Council has developed over the past year, a third of stakeholders report *improvement* ($n = 260$, 32%), while a smaller proportion indicate it has *got worse* ($n = 79$, 10%). The majority of stakeholders, however, do *not* perceive a change in the quality of their working relationship ($n = 429$, 52%), as shown in Figure 53.

Figure 53. Perceived changes in relationship quality



When compared to the most recent stakeholder report (2015), there has been **little to no change** (see Figure 54). The proportion stating that their relationship has stayed the same over the last 12 months has increased from 37% in 2011 to 53% in 2015, but remained consistent in the current study (-1%).

Figure 54. Changes in working relationship rating over time



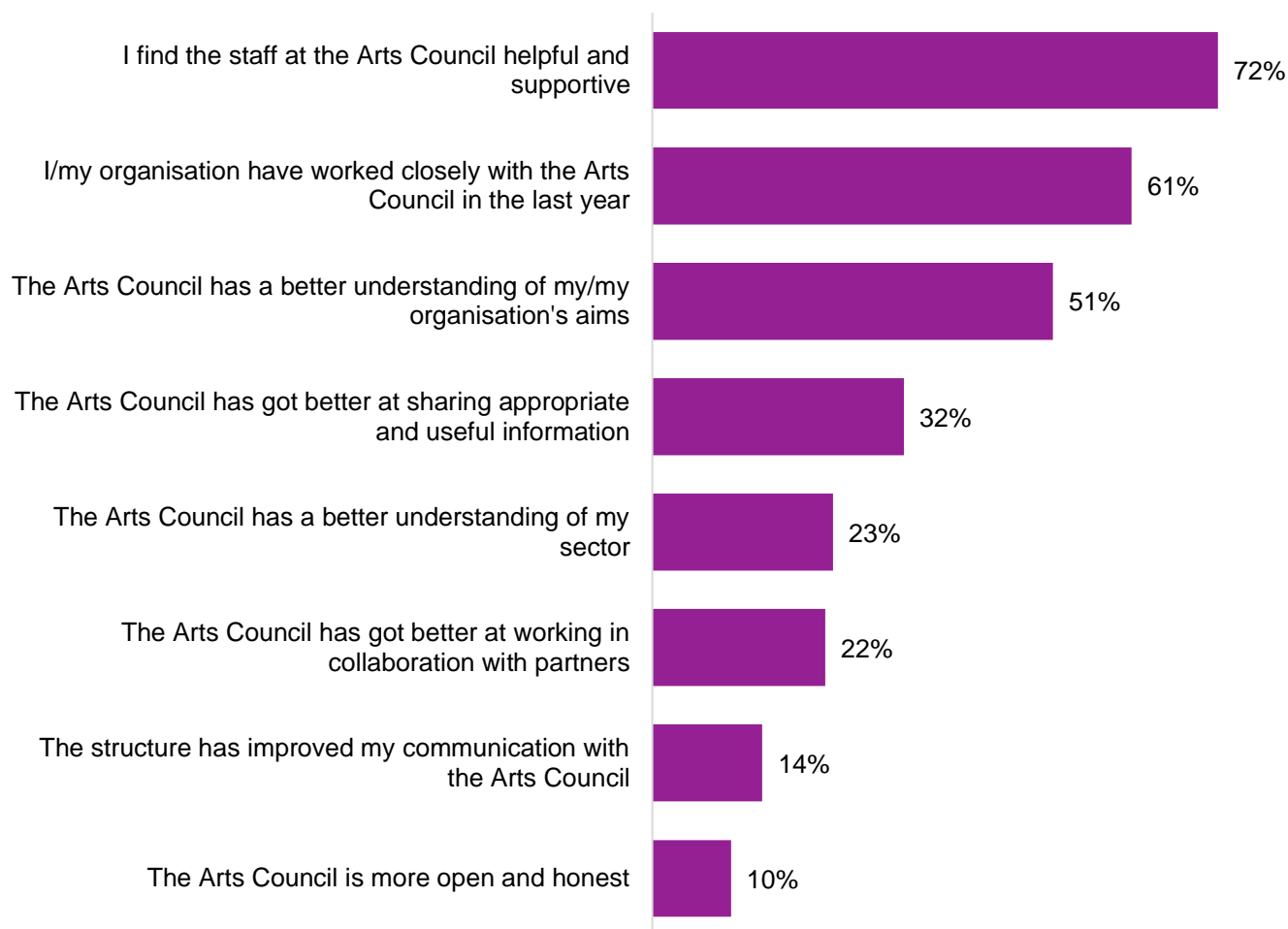
Respondents whose Arts Council relationship is primarily managed through a specific relationship manager are significantly more likely to indicate that their relationship with the Arts Council has improved over the last 12 months ($n = 136$, 36%), compared to those who do not have a regular point of contact ($n = 23$, 16%).

Within the category of respondents who indicate their Arts Council *relationship has improved* in the last 12 months ($n = 260$, 32%), 72% report that this is due to the staff at the Arts Council being *helpful and supportive* ($n = 187$) and a further 61% indicate that they have benefited from a *closer collaboration* with the Arts Council ($n = 158$, see Figure 55). Moreover, half of stakeholders cite a *better understanding* of them or their organisation by the Arts Council as a reason for improvement ($n = 133$, 51%), while a third of stakeholders report that the latter has improved its ways of *sharing appropriate and useful information* ($n = 82$, 32%).

In contrast, stakeholders are less likely to report that the reason for improvement in the working relationship is that the Arts Council has a *better understanding of their sector* ($n = 59$, 23%) or *improved its collaboration with partners* ($n = 56$, 22%). Finally, *better communication* ($n = 36$, 14%) and *more openness and honesty* ($n = 27$, 10%) are the least cited reasons for improvement⁵⁵.

⁵⁵ These results do not necessarily imply that the Arts Council is seen as having a lack of understanding of the sector, collaboration with partners or openness and honesty, as these findings could also indicate already strong performance on these metrics.

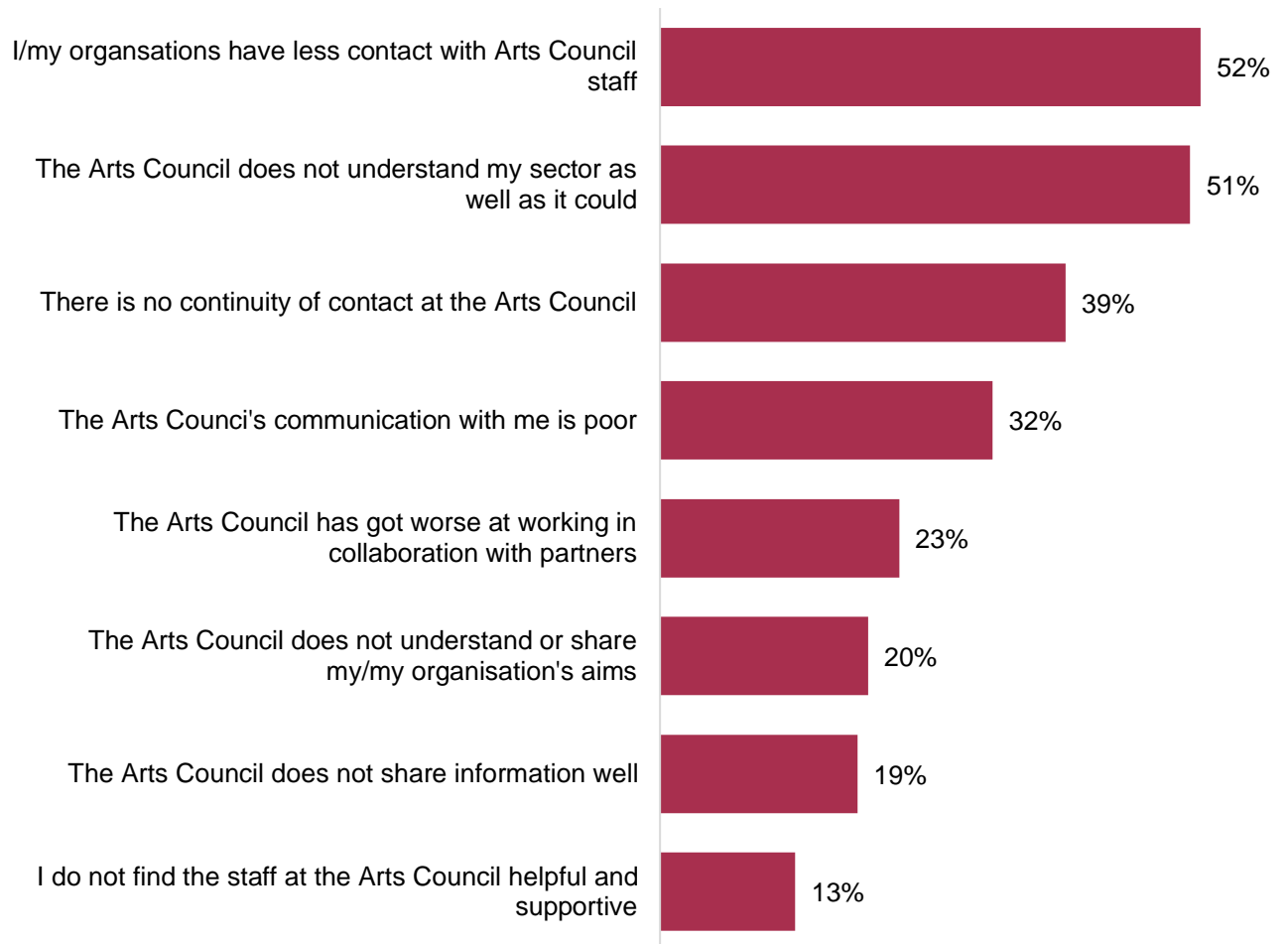
Figure 55. Reasons why working relationship with Arts Council has improved



(Base: All who report their working relationship with the Arts Council has improved, N = 260)

Within the category of stakeholders who indicate their Arts Council *relationship has got worse* ($n = 79$, 10%), half report that this is due to *having less contact* with Arts Council staff ($n = 41$, 52%, see Figure 56) and to the Arts Council *not understanding their sector* as well as it should ($n = 40$, 51%). Some also remark on a *lack of continuity of contact* at the Arts Council ($n = 31$, 39%) and *poor communication* ($n = 25$, 32%) as reasons for relationship deterioration. *Deterioration in collaboration* ($n = 18$, 23%), a *lack of understanding* of stakeholders' aims ($n = 16$, 20%) or *poor sharing of information* ($n = 15$, 19%) are mentioned less frequently.

Figure 56. Reasons that working relationship with Arts Council has worsened



(Base: All who report their working relationship with the Arts Council has worsened, N = 79)

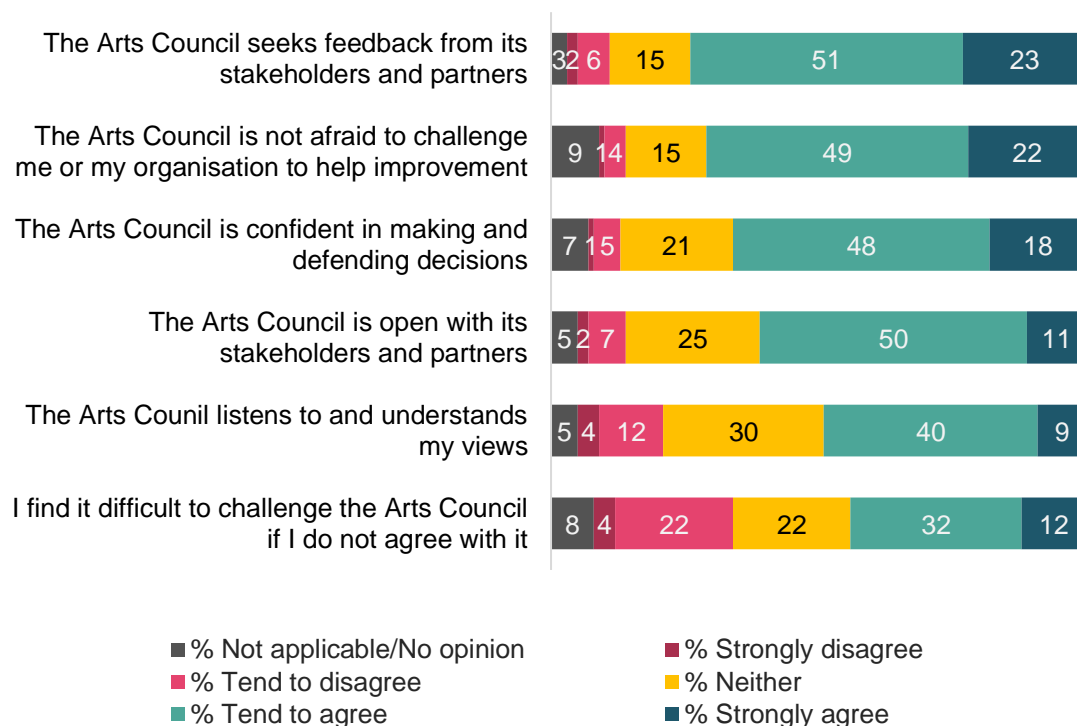
4.5 Openness of relationship with stakeholders

Openness with stakeholders is an important basis for trust and has a strong influence on stakeholders' perceptions of the Arts Council. Overall, stakeholders have a great deal of trust in the openness of their relationship with the Arts Council. For instance, the majority of stakeholders believe that the Arts Council *seeks feedback* from its stakeholders and partners on a regular basis ($n = 573$, 74%) and that it *is not afraid to challenge their organisation to help it improve* ($n = 550$, 71%, see Figure 57).

Moreover, stakeholders generally believe that the Arts Council is *confident in making and defending decisions* ($n = 511$, 66%) and that it is *open with its stakeholders and partners* ($n = 475$, 61%).

However, the Arts Council is seen to perform less well on other aspects. For example, while half feel that the Arts Council *listens to and understands their views* ($n = 388$, 49%), some think that this is not the case ($n = 125$, 16%). Similarly, almost half of stakeholders *find it difficult to challenge the Arts Council* if they do not agree with it ($n = 349$, 44%), while only about a quarter of stakeholders disagree ($n = 202$, 26%).

Figure 57. Openness of relationship with stakeholders

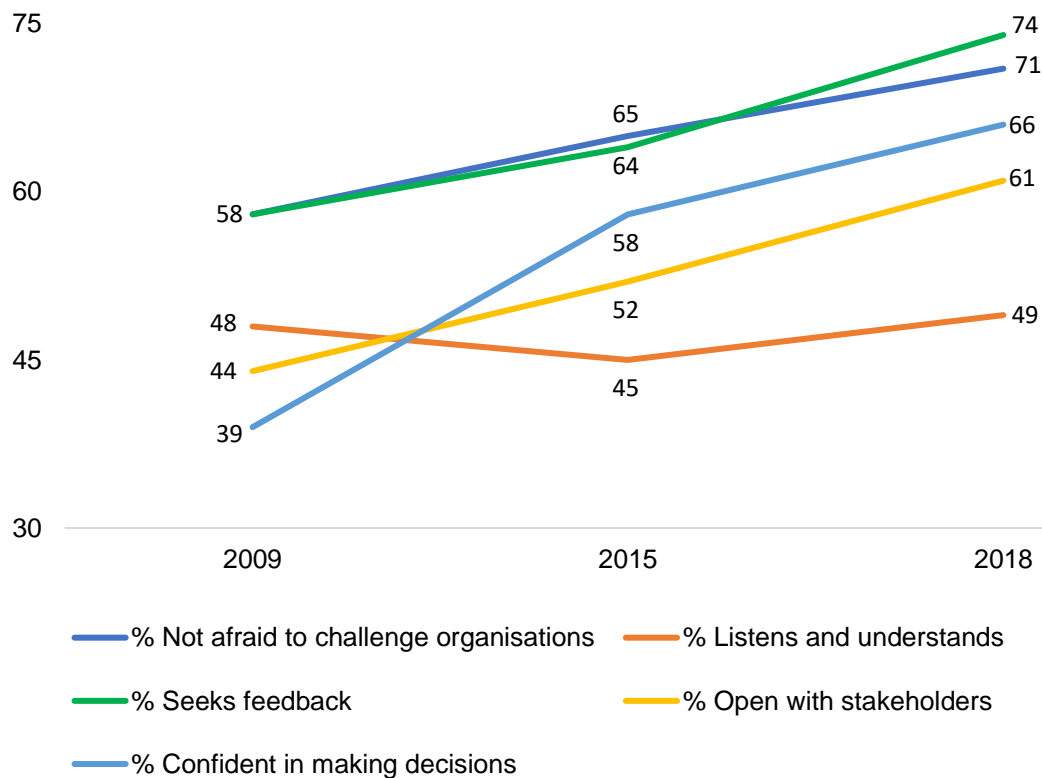


(Base: All respondents, $N = 982$)

Over the past three years, there have been various developments regarding the Arts Council's openness with its stakeholders, typically in a positive direction. The strongest improvement has occurred in the perception that the Arts Council *seeks feedback* from its stakeholders and partners, with 74% indicating this to be the case in 2018, compared to 64% in 2015 (see *Figure 58*).

Improvements of comparable magnitude are observed for stakeholders' perceptions of the Arts Council's general openness (52%, +9%) and its confidence in making robust decisions (58%, +8%). Relatively smaller changes are noted for the Arts Council's propensity to challenge organisations to help them improve (65%, +6%) and its attention to and understanding of stakeholders' views (45%, +4%), although the latter reflects a return to 2011 levels.

Figure 58. Changes in openness of relationship with stakeholders over time



The proportions of stakeholders who report that the Arts Council is receptive and understanding of their views has increased slightly.

4.6 Respect and confidence

The relationship between the Arts Council and its stakeholders is based on a mutual understanding and benefit. Consequently, how the Arts Council is perceived to go about its work is an important point of reference to what extent stakeholders believe the Arts Council is living up to its expectations as a body that is investing public money.

In general, stakeholders hold a positive attitude about how the Arts Council delivers its work and have confidence in its current leadership (see *Figure 59*).

Figure 59. Stakeholders' partnership views of the Arts Council

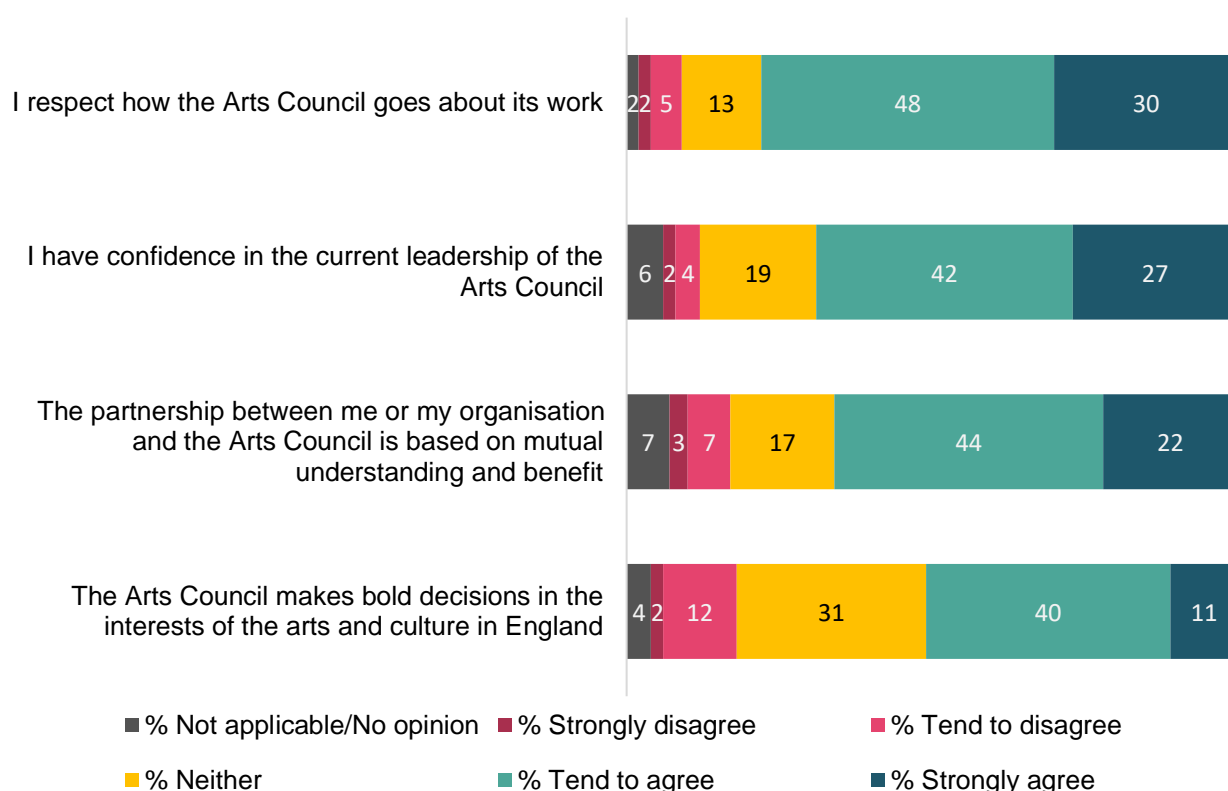


The majority respect how the Arts Council does its work (n = 593, 78%) and have confidence in its current leadership (n = 518, 69%, see *Figure 60*).

When it comes to the partnership between stakeholders and the Arts Council, most report that their *partnership with the Arts Council is based on mutual understanding and benefit* (n = 499, 66%), while only a minority disagree (n = 81, 10%).

Mirroring the findings of the most recent (2015) report, stakeholders are more sceptical about the Arts Council’s ability to *make bold decisions*. Although half agree that it does (n = 397, 51%), some do not believe it makes bold decisions (n = 107, 14%). On a positive note, however, the proportion of stakeholders who do not believe the Arts Council makes bold decisions has *decreased* compared to 2015 (20%, -6%), while the proportion who believe it does make bold decisions has increased (44%, +7%).

Figure 60. Respect and confidence in Arts Council’s work

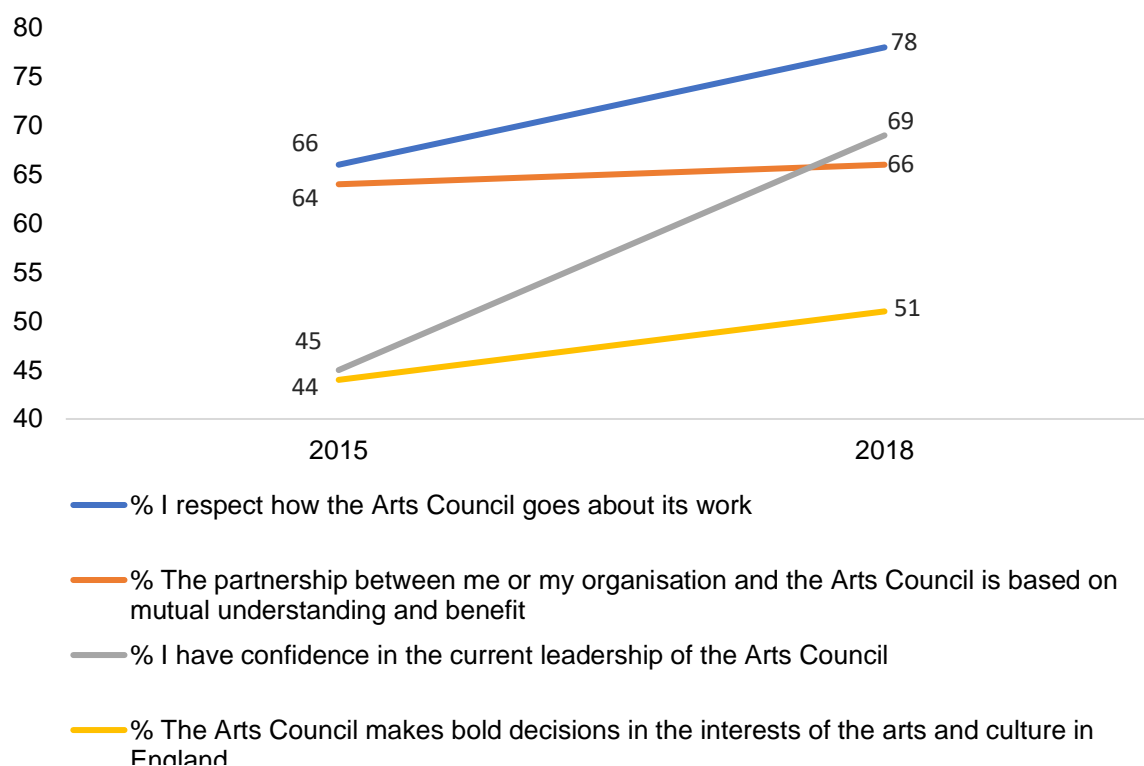


(Base: All respondents, N = 982)

When considering developments over time on the other measures (see *Figure 61*), there has been a rise in the proportion of stakeholders who respect how the Arts Council goes about its work – from 66% in 2015 to 78% in 2018 (+12%) – and a substantial increase in stakeholders’ confidence in the current leadership of the Arts Council (2015: 45%, +24%).

Finally, the proportion who feel that their relationship with the Arts Council is based on mutual understanding and benefit has remained stable (64% 2015; 66% 2018).

Figure 61. Changes in respect and confidence compared to the previous (2015) survey



The overall level of confidence in Arts Council leadership is considerably higher than in 2015 (45%, +24%) and varies significantly by stakeholder category⁵⁶. Stakeholders from *Children and Young People* organisations have a great deal of confidence in the Arts Council’s current leadership ($n = 38$, 84%), reflecting their generally positive views overall. In contrast, *Arts individuals* are the least confident in the Arts Council’s leadership ($n = 49$, 53%)⁵⁷.

Indeed, those who are in contact with the Arts Council most frequently are significantly more positive about senior leadership⁵⁸. While about half of stakeholders in contact with the Arts Council *2-3 times a month* express confidence in its senior leadership ($n = 48$, 48% ‘strongly agree’), this proportion significantly decreases for respondents who are in contact *every 2-3 months* ($n = 50$, 28%) or less ($n = 36$, 14%)⁵⁹.

There are no significant differences between stakeholder categories when it comes to respecting how the Arts Council goes about its work⁶⁰.

⁵⁶ Chi-squared: $\chi^2(28) = 44.4$, $p = .025$

⁵⁷ Unweighted proportions differ significantly at $\alpha = 0.05$

⁵⁸ Chi-squared: $\chi^2(28) = 92.6$, $p < .001$

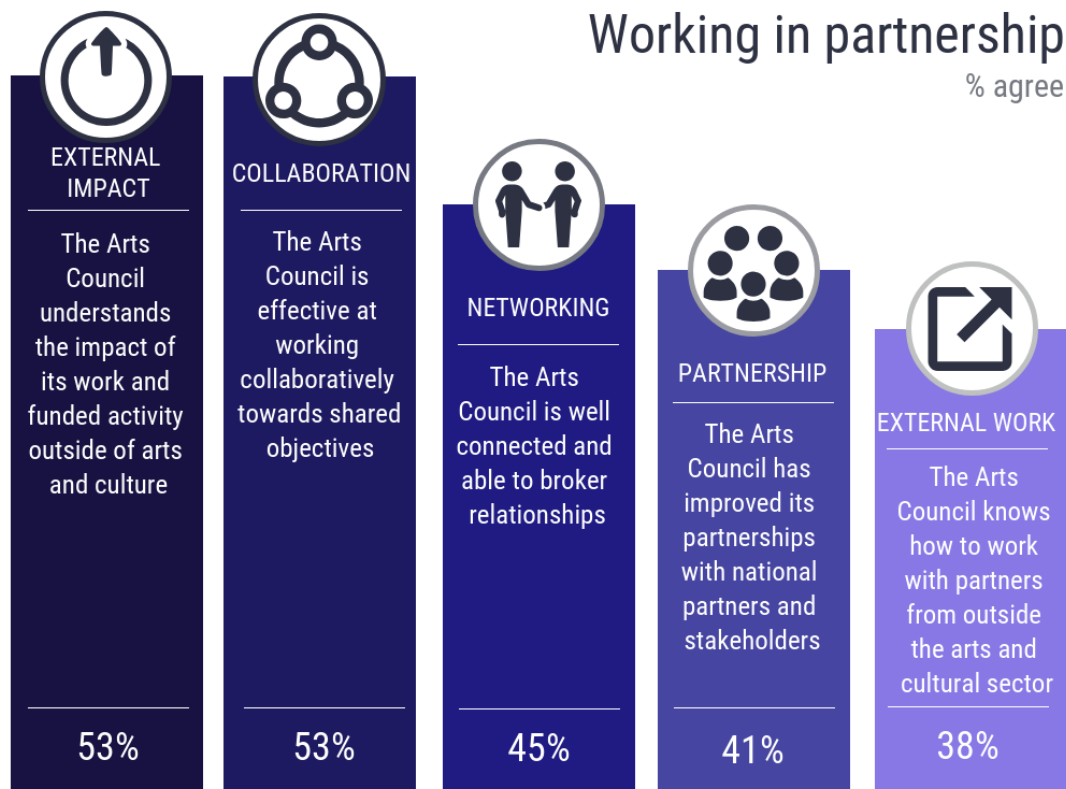
⁵⁹ Unweighted proportions differ significantly at $\alpha = 0.05$

⁶⁰ Chi-squared: $\chi^2(28) = 34.7$, $p = .18$

4.7 Working in partnership

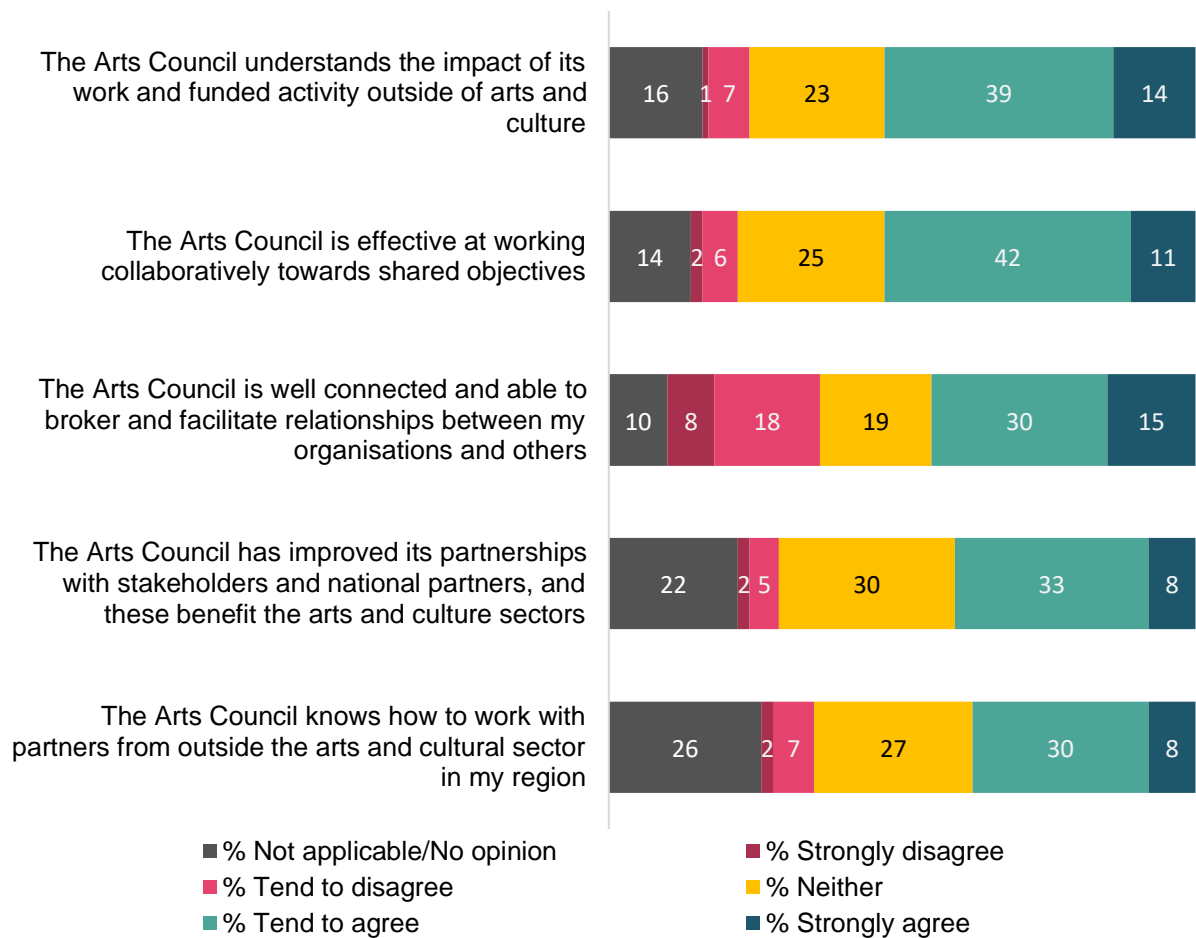
Overall, stakeholders regard the Arts Council as a knowledgeable organisation that is conscious about its impact both within and outside of the arts and culture sector, while also showing good capacity to collaborate with and facilitate relationships between stakeholders (see *Figures 62 and 63*).

Figure 62. Arts Council's perceived capacity to work in partnership



More than half of stakeholders agree that the Arts Council *understands the impact of its work* and funded activity on policy areas outside of arts and culture ($n = 398$, 52% agree compared to $n = 66$, 8% who disagree) while almost half agree that the Arts Council *is well connected and able to broker relationships* within the sector ($n = 339$, 45% agree compared to $n = 199$, 26% who disagree). Moreover, stakeholders also indicate that the Arts Council is *capable of working collaboratively* towards shared objectives ($n = 390$, 53%), while a minority disagree ($n = 62$, 8%).

Figure 63. Perceptions of work in partnership



(Base: All respondents, N = 982)

A significant association is evident for stakeholders' views of the Arts Council being able to facilitate relationships between their organisation and others⁶¹ and its efforts to improve its collaboration with stakeholders and national partners⁶².

⁶¹ Chi-squared: $\chi^2(28) = 56.3, p < .01$

⁶² Chi-squared: $\chi^2(28) = 75.4, p < .001$

COMMUNICATIONS



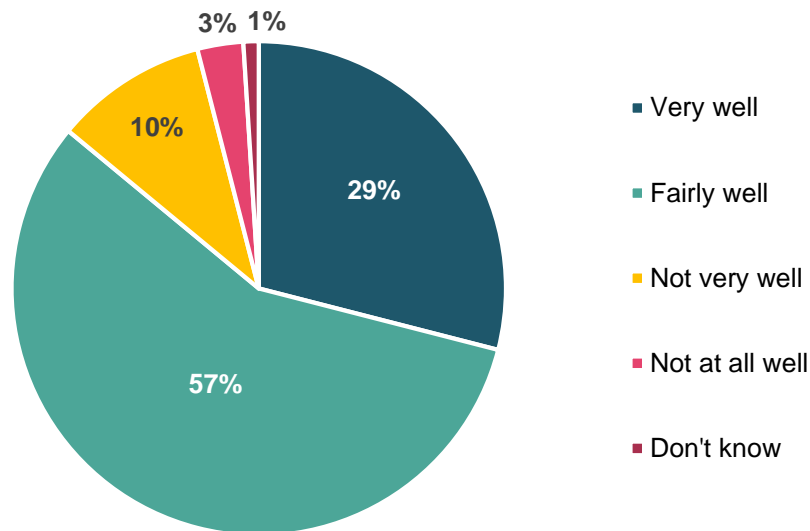
5. Communications

This section reports on how stakeholders feel about the communications produced by the Arts Council. This includes how well-informed they feel about the Arts Council and its work, which channels of communication they prefer and their views on the various communications they receive.

5.1 Feeling informed

Overall, a majority believe that the Arts Council keeps its stakeholders *well informed* about its work. Most stakeholders report they are well informed ($n = 620$, 86%, see *Figure 64*), substantially more than in 2015 (77%, +9%). Conversely, only a minority report they do not feel well informed ($n = 95$, 13%).

Figure 64. Feeling informed about Arts Council work



(Base: All respondents, $N = 982$)

How well informed stakeholders feel varies significantly by stakeholder category⁶³ (also see *Appendix 3*). Stakeholders related to children and young people ($n = 40$, 93%) and arts organisations ($n = 441$, 89%) report feeling well informed particularly often⁶⁴.

The results show a correlation between stakeholders feeling well informed about the Arts Council's work and thinking more highly of the Arts Council⁶⁵. For example, those who *would speak highly of the Arts Council without being asked* are significantly more likely than any other group to feel *very well* informed ($n = 93$, 50%)⁶⁶. Those who *would speak highly of the Arts Council if asked*, in turn, are significantly more likely to feel *fairly well* informed ($n = 170$, 63%) than those who would speak highly without being asked ($n = 90$, 48%)⁶⁷. Overall, 96% of those who would speak highly of the Arts Council to others feel well informed ($n = 437$), compared to 62% of those who are critical ($n = 47$, see *Figure 65*).

⁶³ Chi-squared: $\chi^2(21) = 63.7$, $p < .001$

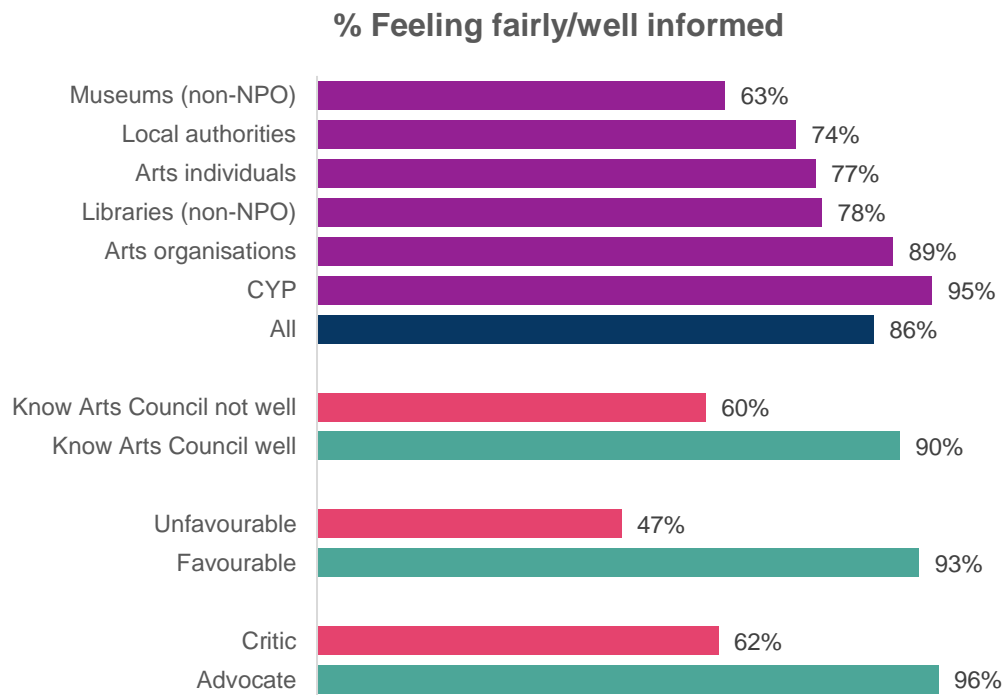
⁶⁴ Unweighted proportions differ significantly at $\alpha = 0.05$

⁶⁵ Chi-squared: $\chi^2(12) = 200.4$, $p < .001$

⁶⁶ Unweighted proportions differ significantly at $\alpha = 0.05$

⁶⁷ Unweighted proportions differ significantly at $\alpha = 0.05$

Figure 65. Feeling well informed by stakeholder group and overall perception



(Base: All respondents, N = 982)

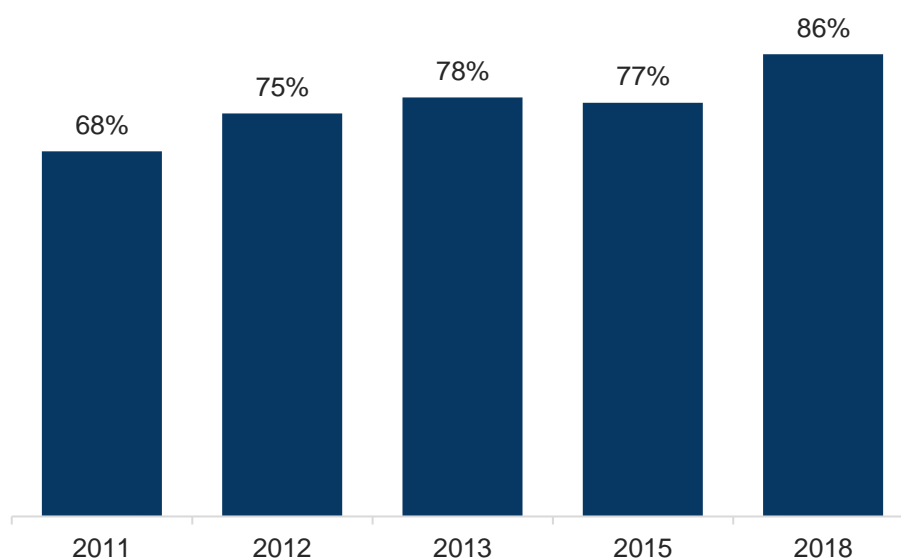
Whether stakeholders feel informed or not is also strongly associated with whether they have a *specific point of contact* at the Arts Council⁶⁸. While 92% of stakeholders who have a specific point of contact at the Arts Council indicate feeling well informed about its work ($n = 316$), only 63% of those with no formal contact person feel well informed ($n = 77$).

⁶⁸ Chi-squared: $\chi^2(21) = 132.9, p < .001$

A statistical analysis of predictors indicates that, similar to working relationship quality ratings, 'feeling informed' ratings are positively linked to *favourability* scores of the Arts Council (i.e. those who feel more informed are more favourable towards the Arts Council) and *familiarity* scores (i.e. those who feel more informed also report familiarity with the Arts Council). 'Feeling informed' ratings are negatively related to *advocacy* scores and *frequency of contact* with the Arts Council (i.e. those who feel less well informed also tend to speak more critically of the Arts Council and to have less frequent contact with the Arts Council). Finally, we find that arts organisations generally feel better informed than other stakeholder groups. The complete analysis is provided in the **Technical Appendix TA3**.

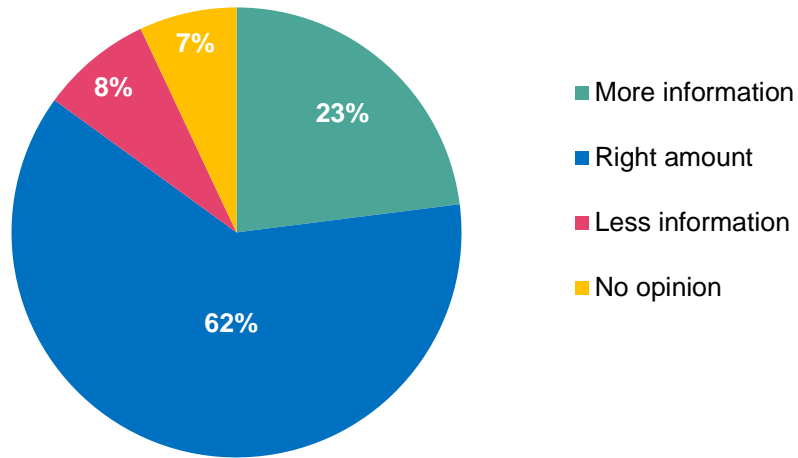
The proportion of stakeholders who feel well informed by the Arts Council has increased since the previous stakeholder survey in 2015 (see *Figure 66*). While there was a moderate leap between 2011 and 2012 (2011: 68%, +7%), this proportion had remained consistent until 2015. However, in 2018 there is, yet again, a larger increase visible (2015: 77%, +9%), suggesting that stakeholders may feel the Arts Council has improved its performance on this metric.

Figure 66. Feeling informed changes over time



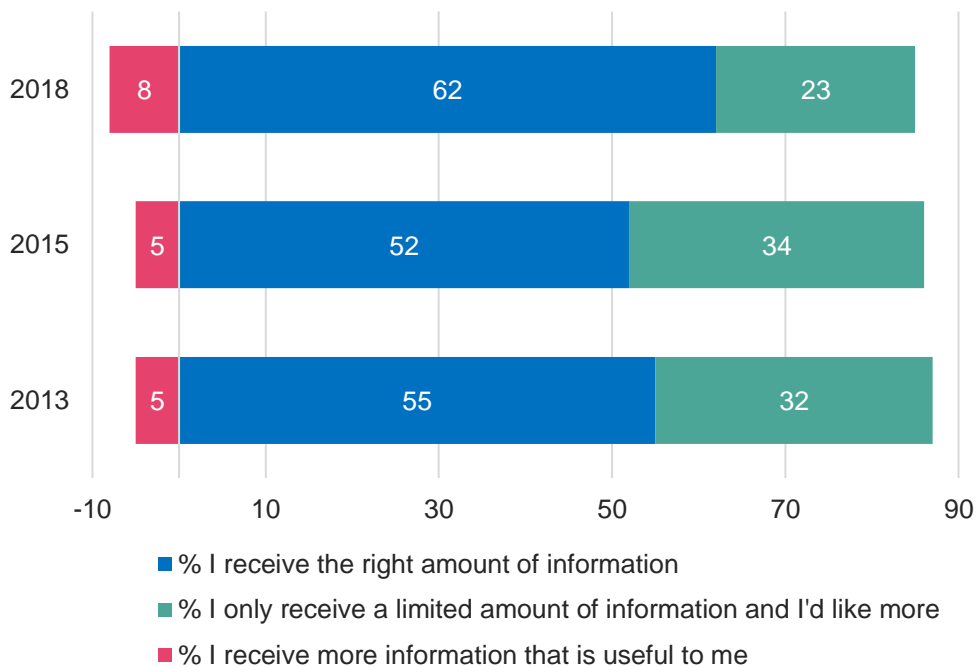
In line with the earlier findings from past iterations of the Stakeholder Focus Research, an increased proportion of Arts Council's stakeholders indicate that they *receive the right amount of information* ($n = 481$, 62%), whereas less than a quarter indicate that they *only receive a limited amount of information* and would like more ($n = 178$, 23%, see *Figure 67*). Moreover, only a small proportion of stakeholders report that they get too much information ($n = 65$, 8%).

Figure 67. Stakeholder preference for amount of information received



Compared to 2015, more stakeholders indicate they are receiving the right amount of information (62%, +10%), while the proportion desiring more information has decreased (23%, -11%), suggesting that stakeholders are more content with the amount of information they receive (see Figure 68).

Figure 68. Changes in desired amount of information over time

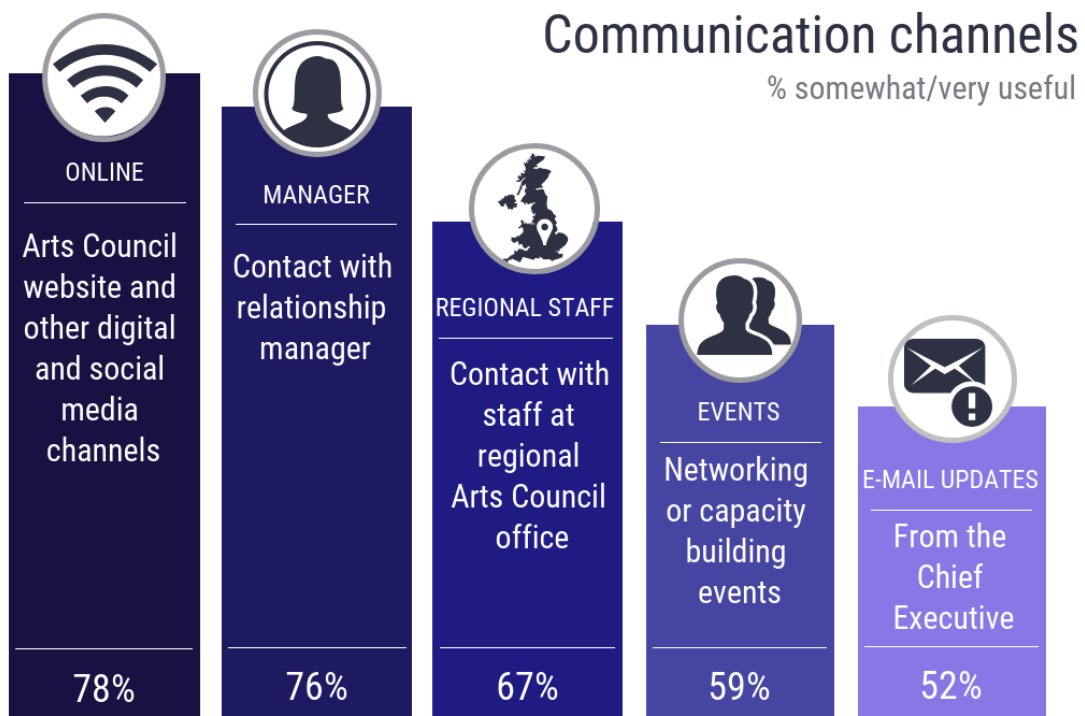


5.2 Communication channels

Stakeholders engage with the Arts Council through different mechanisms. The majority of participating stakeholders have frequent contact with their relationship manager, via email, phone or face-to-face meetings. However, not all stakeholders have a specific relationship manager as a regular point of contact and rely on other channels such as the Arts Council’s online facilities or Arts Council staff at their regional office.

To explore which communication channels stakeholders find most useful (*Figure 69*), they were asked a series of statements regarding their communication behaviour.

Figure 69. Usefulness of communication channels

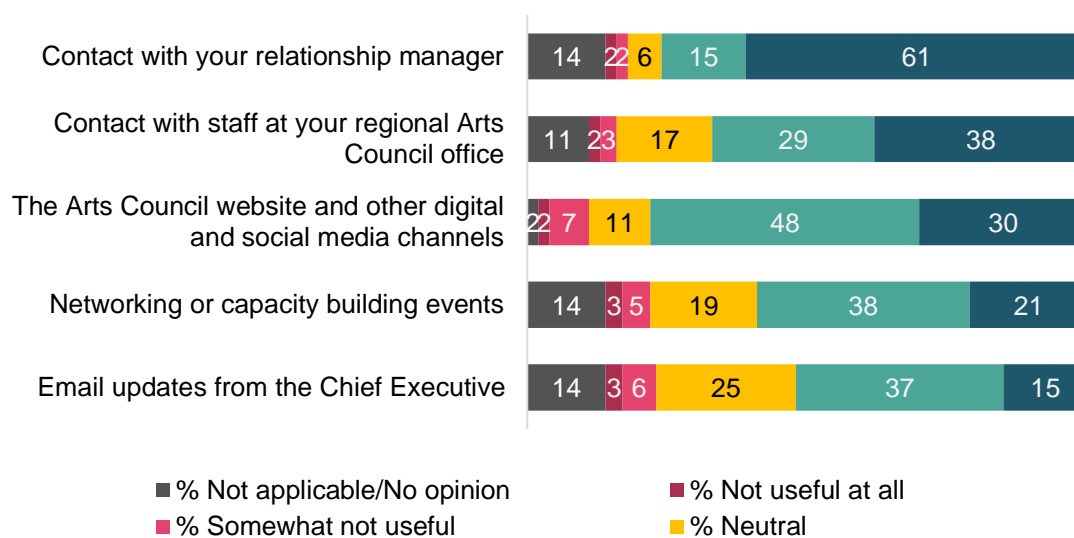


Personal contact with relationship managers continues to be considered one of the most useful channels of communication (see *Figure 70*).

In total, a majority of stakeholders report that *contact with relationship managers is useful* ($n = 591$, 76%), while very few disagree ($n = 33$, 4%), the latter representing a small improvement from 2015 findings (8%, -4%). In particular, a greater proportion of stakeholders indicate the contact with their relationship manager is ‘*very useful*’ ($n = 471$, 61%), also representing a small improvement on 2015 findings (57%, +4%).

This indicates that the personal contact offered by Arts Council relationship managers is considered somewhat more important than in the past.

Figure 70. Usefulness of communication channels



(Base: All respondents, N = 982)

Similarly, most stakeholders find contact with staff at regional offices useful: two thirds of stakeholders report *contact with regional staff is useful* ($n = 514, 67\%$), up +9% from 2015 (58%), compared to very few who say this contact is not useful ($n = 41, 5\%$).

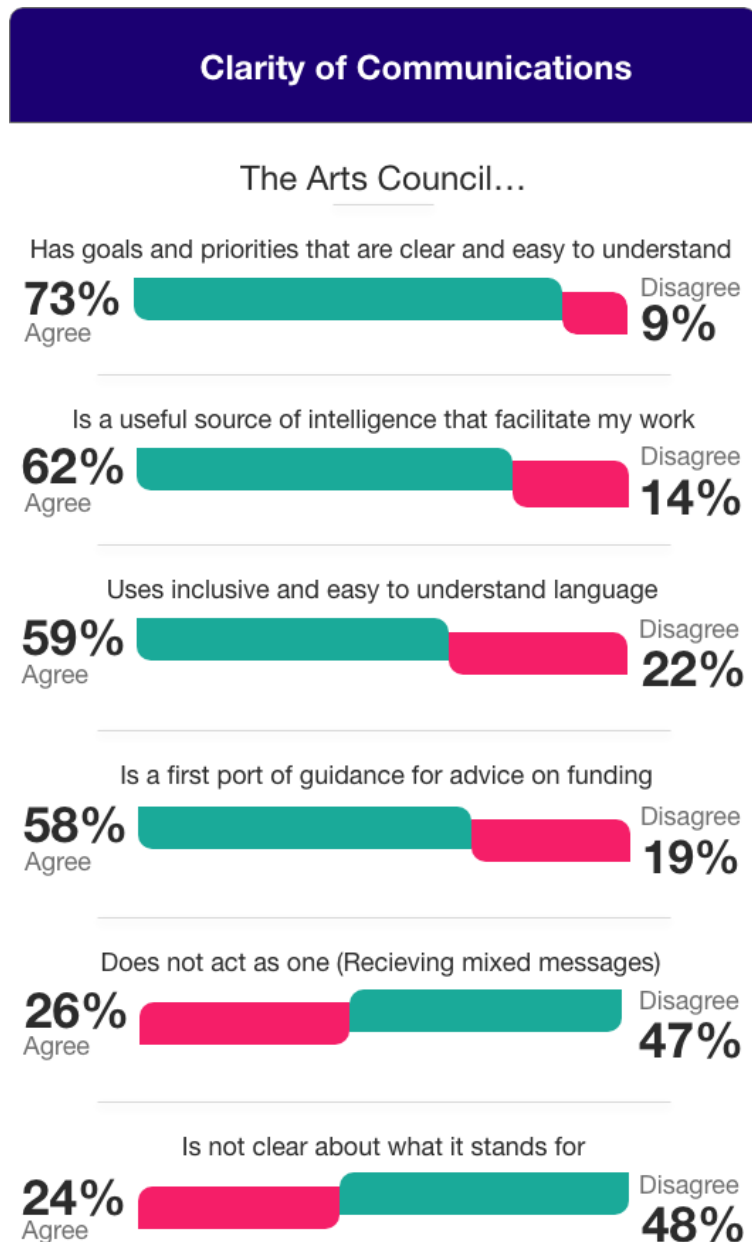
A strong majority of stakeholders indicate that the Arts Council’s website and other digital channels are useful ($n = 600, 78\%$), representing a considerable improvement compared to 2015 findings (58%, +20%). This suggests that the Arts Council has greatly improved its available online resources. However, some still feel these digital resources are not useful ($n = 67, 9\%$).

The communication channels of ‘*networking or capacity building events*’ ($n = 452, 58\%$) and ‘*email updates from the chief executive*’ ($n = 399, 52\%$) tend to have a lower level of support amongst stakeholders, although they are much more highly rated than in previous years (2015: 45% and 35%, respectively). This suggests that the Arts Council has made progress in increasing the usefulness of networking and capacity building events (+13%) and email updates from the chief executive (+17%).

5.3 Clarity of communications

The Arts Council aims to keep interactions with stakeholders clear, coherent and consistent to ensure a shared understanding of its goals and priorities and to underpin effective working relationships. Most stakeholders report positive views about specific dimensions of Arts Council communication, as shown below (see *Figure 71*):

Figure 71. Perceived clarity of communications

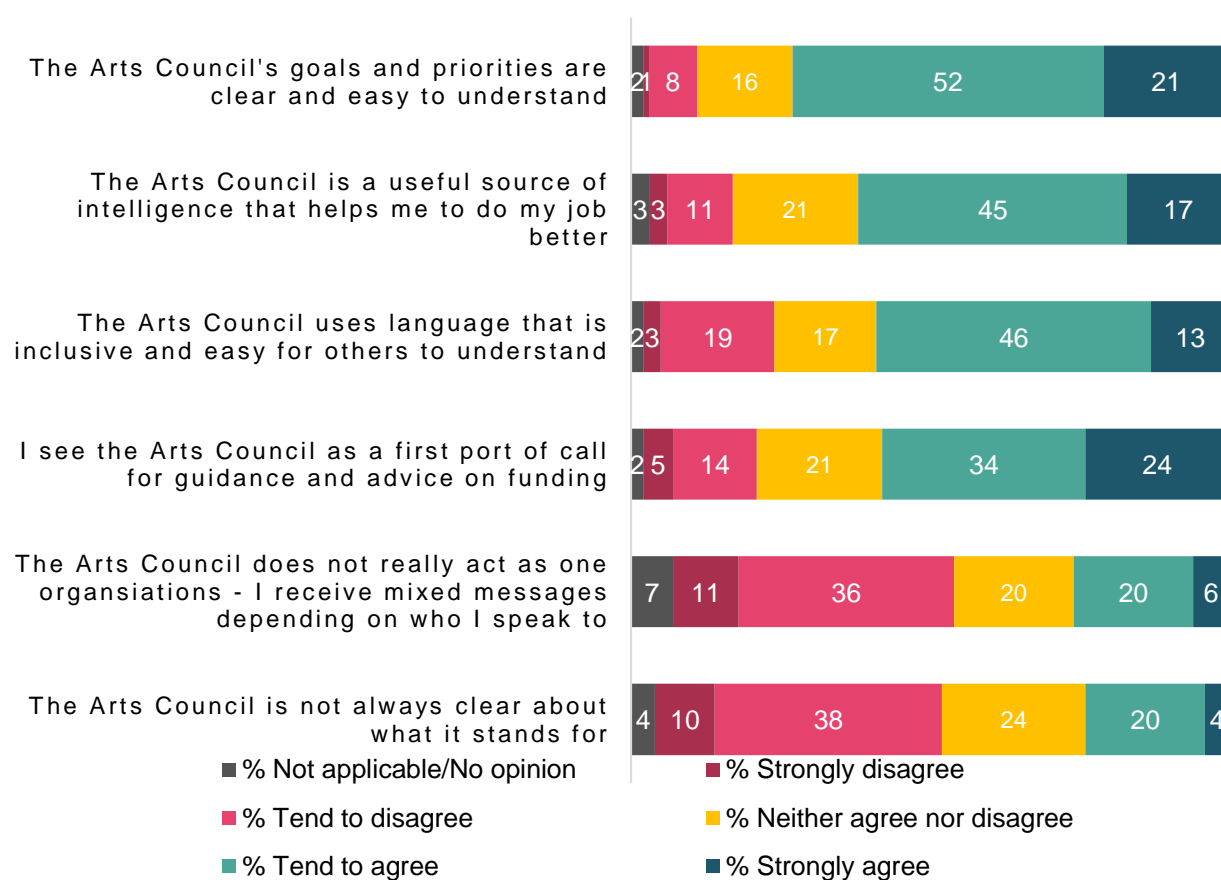


The Arts Council is performing well in the clarity of its goals and priorities, its role as useful source of intelligence and its use of inclusive and easy to understand language (see *Figure 72*). Nevertheless, stakeholders' experiences are not all positive.

For instance, while a majority report that the Arts Council's *goals and priorities are clear and easy to understand* ($n = 575, 73\%$), some question how this is communicated ($n = 71, 9\%$). While most report that the Arts Council *uses language that is inclusive and easy to understand* ($n = 455, 59\%$), more than a fifth disagree ($n = 170, 22\%$). Further, a quarter indicate that they *receive mixed messages* ($n = 206, 26\%$) and that the Arts Council is *not always clear about what it stands for* ($n = 190, 24\%$).

Stakeholders generally trust the Arts Council as a *valued source of information* ($n = 475, 61\%$) and most stakeholders *first consult the Arts Council for guidance and advice on funding* ($n = 438, 58\%$). Relatively fewer stakeholders do not view the Arts Council as a useful source of intelligence ($n = 111, 14\%$) or point of guidance ($n = 149, 19\%$).

Figure 72. Clarity of communications

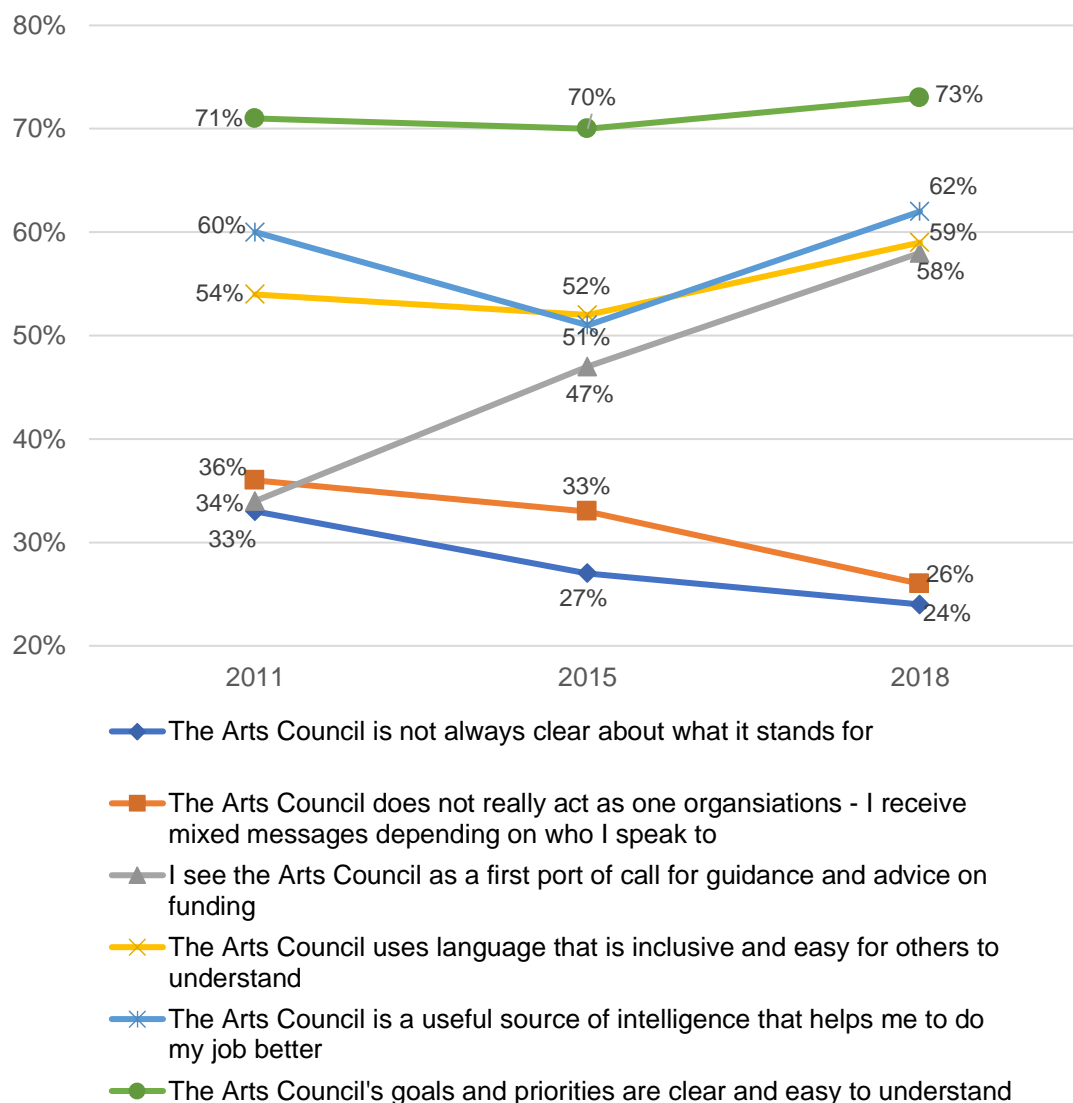


(Base: All respondents, $N = 982$)

Compared to 2015, there have been some important improvements (see Figure 73). In particular, there has been a gradual rise in the proportion of stakeholders who see the Arts Council as a useful source of intelligence that facilitates stakeholders' work (62%; 2015: 51%, +11%), returning to 2011 levels (60%), and those who see it as a first port of call for guidance and advice on funding (58%; 2015: 47%, +11%).

A continuous improvement can also be observed among those who do not believe that the Arts Council acts as one organisation (26%; 2015: 33%, -7%) and those who agree that the Arts Council uses inclusive language that is easy for others to understand (59%; 2015: 52%, +7%).

Figure 73. Changes in clarity of communications over time



Regarding the clarity of its goals and priorities (73%; 2015: 70%, +3%), as well as the clarity about what the Arts Council stands for (24%; 2015: 27%, -3%), there has been no substantial change compared to previous years, although there remains room for improvement, especially regarding the latter.

FUTURE PRIORITIES

6. Future priorities

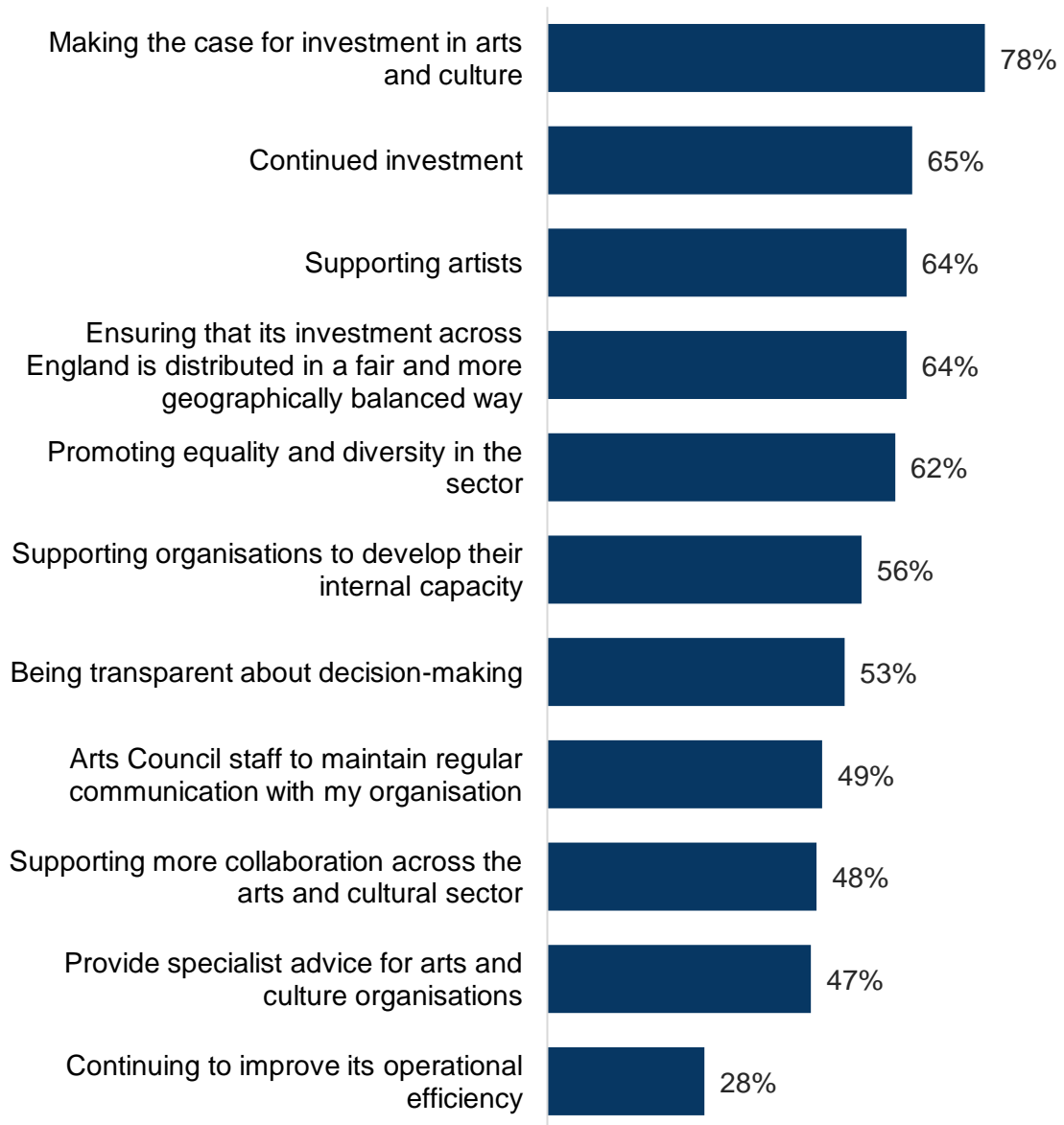
Stakeholders have a vision of what the Arts Council needs to do to continue developing a strong and vibrant arts and culture sector. This section deals with stakeholders' perceptions of what the Arts Council's future role should be, in addition to the ways in which the Arts Council can improve its services to stakeholders in the future. Stakeholders in this survey provide their assessment of the most important initiatives for the Arts Council to continue. Stakeholders in this survey provide their assessment of the most important initiatives for the Arts Council to continue (see *Figure 74*) and feedback on the services that the Arts Council most needs to improve (*Figure 76*).

Figure 74. Views on Arts Council future priorities



The responsible and efficient use of funding resources by the Arts Council is considered an important future task (see *Figure 75*). Most stakeholders indicate that one of the most important future priorities is ensuring that Arts Council investment across England is *distributed in a fair and more geographically balanced way* ($n = 513$, 64%). London-based stakeholders are less inclined ($n = 65$, 32%) to see this as a priority.

Figure 75. Views on Arts Council most important future priorities



(Base: All respondents, $N = 982$)

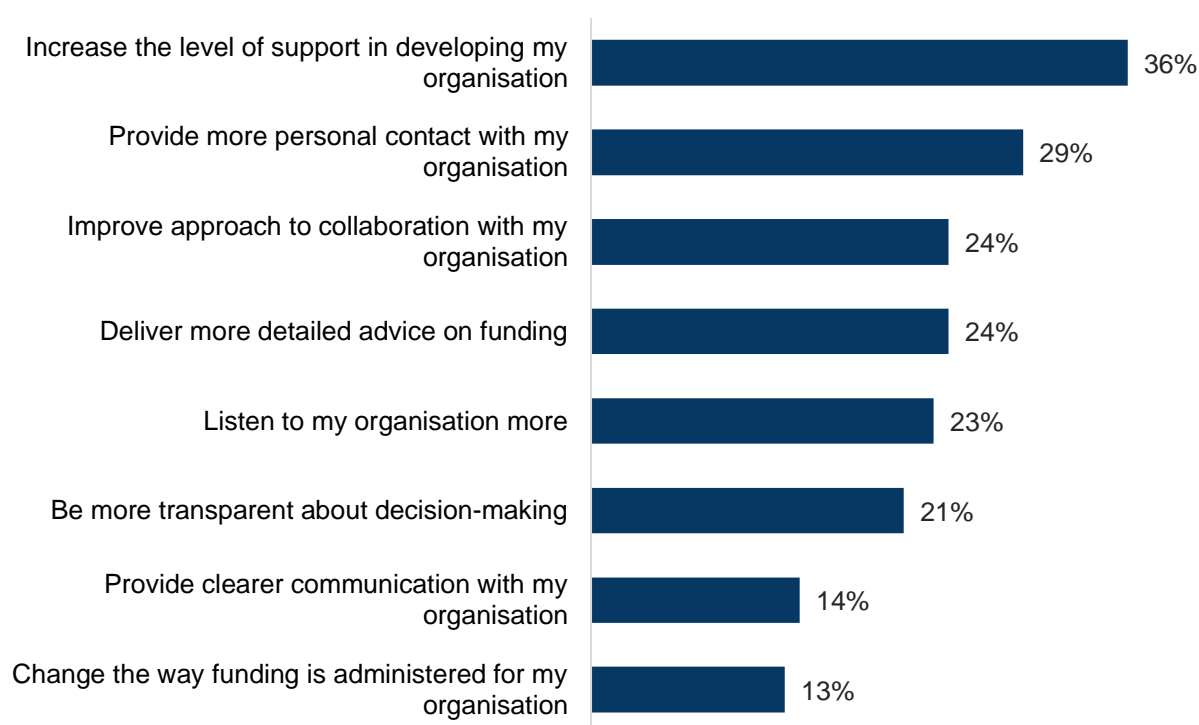
Meanwhile, stakeholders in the East Midlands ($n = 49$, 92%) and West Midlands ($n = 46$, 81%) are more concerned about the *distribution of investment*. Ensuring a fair and more geographically balanced distribution is thus important in the next twelve months.

The Arts Council has an important advocacy responsibility, alongside its investment and development roles. Indeed, advocacy is highlighted by stakeholders as a key aspect of the Arts Council's role that should be prioritised in the year to come: The majority of stakeholders suggest that '*making the case for investment in the arts and culture*' should be one of the Arts Council's key future priorities in the next twelve months ($n = 623$, 78%).

Most stakeholders see the Arts Council's role of ensuring *continued investment* in arts and culture as a top priority in the next year ($n = 520$, 65%). Respondents point to the Arts Council's role in *supporting artists* across the country as well, with supporting and nurturing artists ($n = 507$, 64%) and *promoting equality and diversity* in the sector ($n = 493$, 62%) identified as key future priorities by a majority of stakeholders.

Stakeholders want greater development support from the Arts Council (see Figure 76). This is evident specifically when stakeholders look ahead to the next twelve months.

Figure 76. Future priorities for improving service



(Base: All respondents, $N = 982$)

As a major priority to improve its services, many stakeholders would like to see the Arts Council more involved in supporting them to develop their organisation in the next 12 months. A substantial minority of stakeholders say that the Arts Council most needs to

support organisational development in the next 12 months ($n = 285, 36\%$), while many stakeholders also would like to have *more personal contact* with Arts Council staff ($n = 229, 29\%$). Other stakeholders indicate the Arts Council needs to *listen to stakeholders more* ($n = 178, 23\%$).

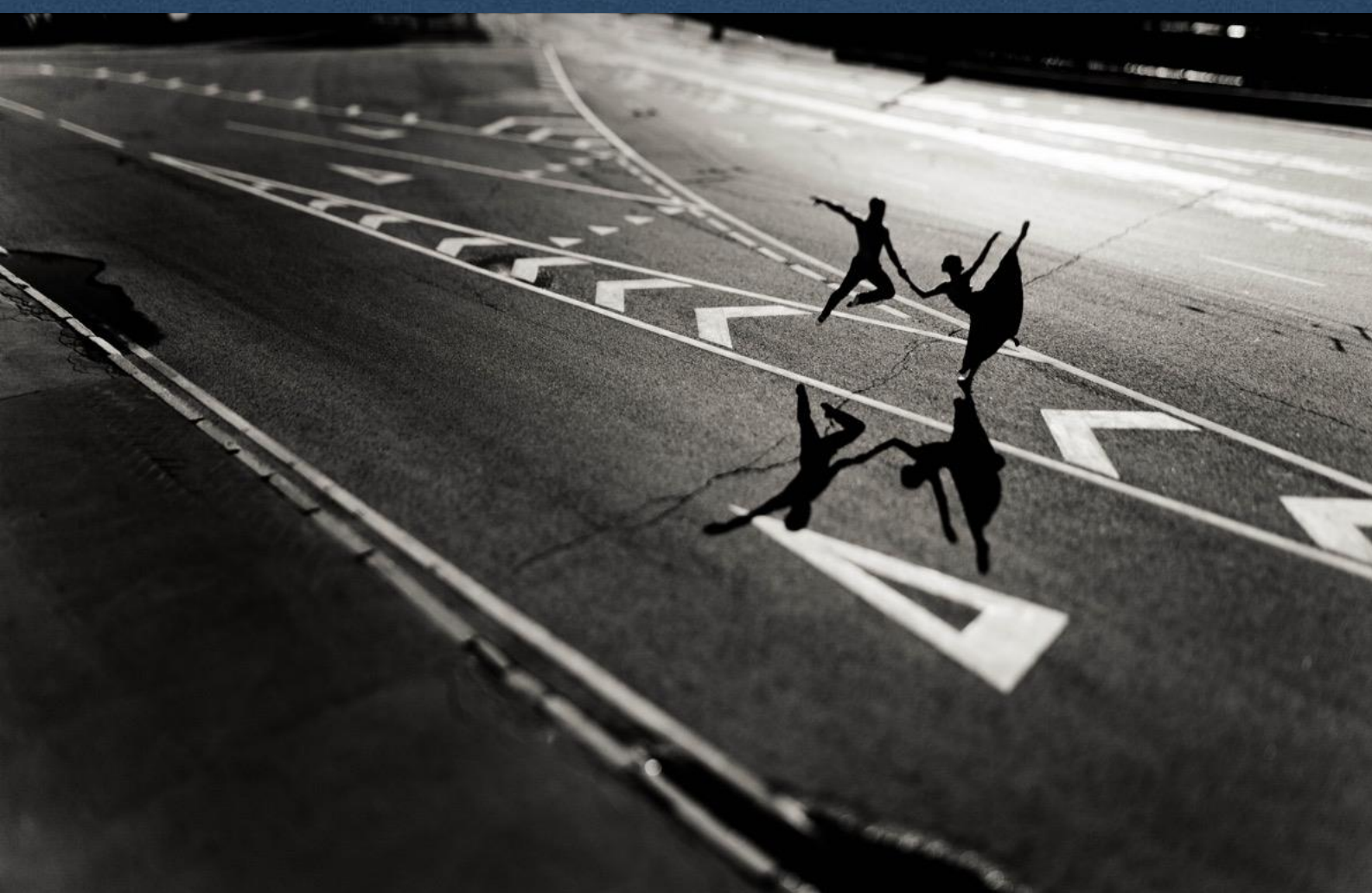
Some stakeholders feel that the Arts Council should focus its resources on providing *more detailed advice on funding* ($n = 186, 24\%$). On a related note, a minority of stakeholders would like to see changes in how funding is administered for their organisations (13%, $n = 102$).

Requests for more detailed advice on funding vary by stakeholder category⁶⁹. Specifically, arts individuals ($n = 36, 39\%$) are significantly more likely than arts organisations ($n = 115, 22\%$) to cite *more detailed advice on funding* as an important priority for improving the Arts Council's development role⁷⁰.

⁶⁹ Chi-squared: $\chi^2(7) = 18.8, p < .01$

⁷⁰ Unweighted proportions differ significantly at $\alpha = 0.05$

CONCLUSIONS



7. Conclusions

Taken as a whole, this research shows that Arts Council England stakeholders value the organisation's role and impact in the arts and culture sector. There is clearly a great deal of positive regard for its performance and effectiveness, and indicators that the level of engagement between the Arts Council and its stakeholders is strong. Most stakeholders have a favourable overall view of the Arts Council, which they said they would declare to other people.

At the same time, there are some clear areas for improvement in the Arts Council's performance and effectiveness from the perspective of its stakeholders. Most of these issues have been identified in previous iterations of the Stakeholder Focus Research, indicating that they are deeply rooted challenges for the Arts Council to address. In particular, there are longstanding concerns about the Arts Council being 'bureaucratic' and lacking 'openness' or transparency in its decision-making. Given that these issues keep being raised, the Arts Council could consider devoting special attention to proactively shifting these negative aspects of its reputation with stakeholders.

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