



Arts Council Stakeholder Research 2017- 2018
Quantitative Report (Strand 2)
Executive Summary

An evaluation report by Qualia Analytics prepared for Arts Council England

Executive Summary

This is the executive summary for the large-scale quantitative strand of the Stakeholder Focus Research ($n = 982$), conducted in 2018.

Key findings

The findings from “Strand 2” of the 2018 Stakeholder Focus Research indicate widespread approval of the Arts Council as an organisation on the dimensions displayed below:



Stakeholders also highlight aspects of the Arts Council’s performance that can further improve:

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1. Promoting equality and diversity in the arts and culture sector.

 2. Collaborating with the sector.

 3. Extending contact between Arts Council representatives and particular categories of stakeholders, especially with individual stakeholders (e.g. artists), museums outside the National Portfolio and libraries.

 4. Demonstrating the value of arts and culture investments.

 5. Strengthening relationships with museums outside the National Portfolio and libraries.

 6. Continuing development of a fair, transparent and geographically-balanced funding approach for the sector.

 7. Improving funding application process (still seen as prohibitive and bureaucratic).
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Overall perceptions

- Stakeholders report a **high degree of familiarity** with the Arts Council overall ($n = 804$, 83%). However, the proportion of stakeholders reporting they **know the Arts Council very well** ($n = 219$, 23%) has declined substantially compared to the previous survey results (2015: 36%, -13%¹).
- The **majority of stakeholders indicate a favourable view** of the Arts Council ($n = 643$, 76%). This is consistent with 2015 results (78%, -2%).
- Most stakeholders report they would **speak positively about the Arts Council when asked** ($n = 535$, 63%). This aligns with findings from 2015 (64%, -1%).
- Overall, 58% of stakeholders are **familiar** with the Arts Council, while simultaneously holding favourable views of it and speaking highly of it with or without being asked ($n = 472$), representing an ideal outcome for the Arts Council (see *Figure 1*).

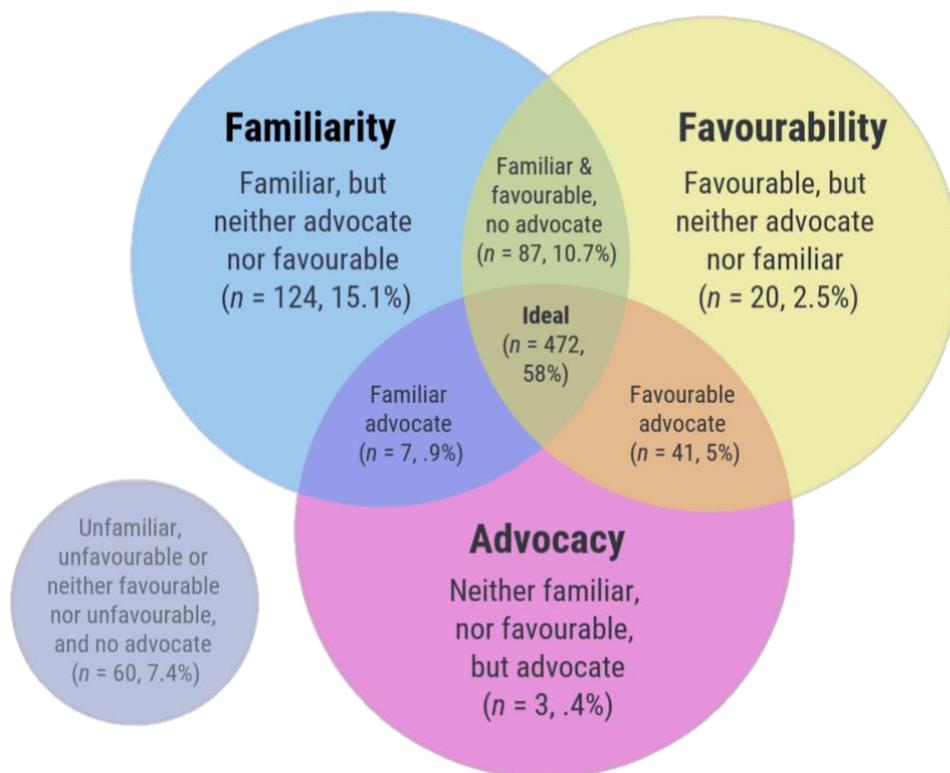


Figure 1. Stakeholders' level of Arts Council familiarity, favourability and advocacy

¹ Here, and throughout the report, differences from the previous Stakeholder Focus Research results are presented as percentage points (not as proportional percent increases).

Current impressions versus ideal characteristics

Stakeholders see Arts Council England's top *current* 'positive' characteristics as **strategic** (46%), **supportive** (42%) and **helpful** (32%):

- These closely match *ideal* characteristics stakeholders want to see in the Arts Council.
- There has been a decrease in the proportion of stakeholders who consider the Arts Council to be **helpful** (2015: 40%, -8%).

Stakeholders also see the Arts Council as **responsive** (23%), **trustworthy** (16%), **authoritative** (17%) and **passionate** (13%).

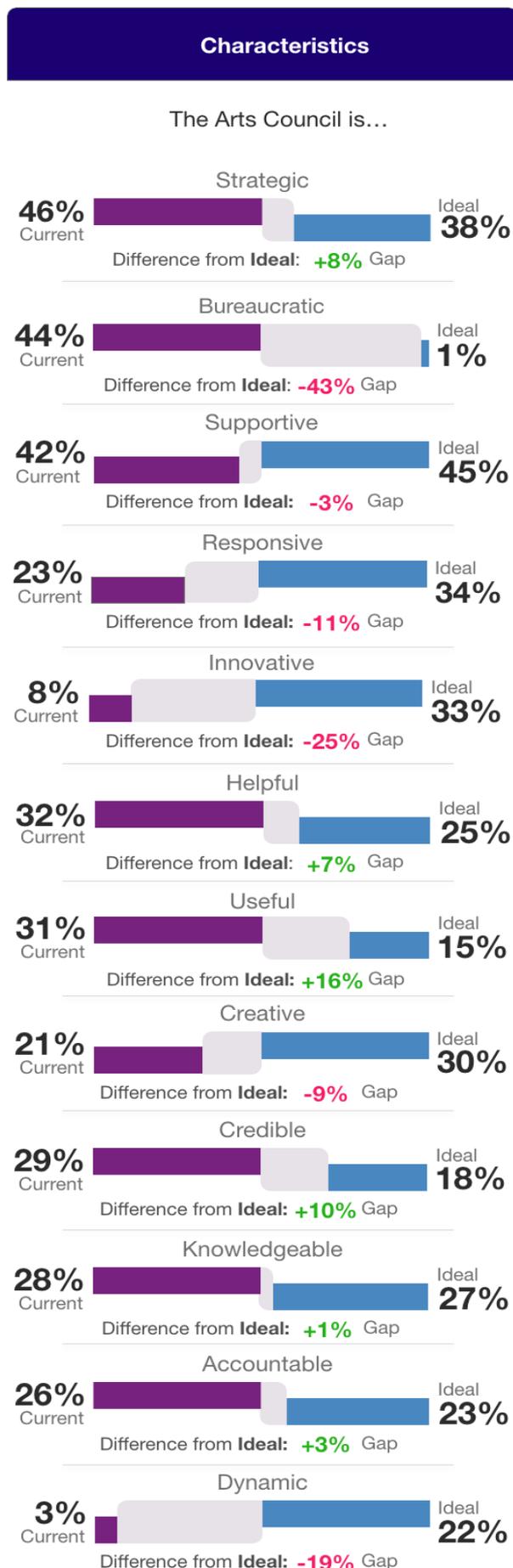
- Compared to 2015, perceptions of the following characteristics show an uplift: **Responsive** (23%, 2015: +10%), **trustworthy** (16%, 2015: +7%), **authoritative** (17%, 2015: +6%) and **passionate** (13%, 2015: +5%).

Stakeholders see Arts Council England top *ideal* characteristics as **diverse** (41%), **collaborative** (37%) and **innovative** (33%):

- Much lower proportions report the Arts Council currently demonstrates these characteristics.

Stakeholders see the Arts Council's *current* 'negative' characteristics as **bureaucratic** (44%), **distant** (20%) and **elitist** (12%).

- Compared to previous findings more stakeholders view the Arts Council as **impermeable** (15%; 2015: +7%) and **old-fashioned** (9%; 2015: +4%).



Performance

The survey shows a majority of stakeholders recognise the Arts Council's focus and commitment to achieving its goals, priorities and mission (see *Figure 2*).



Figure 2. Arts Council performance, understanding of goals and performance on mission

Performance and effectiveness as an organisation

The Arts Council's overall performance receives a generally positive assessment from most stakeholders (see *Figure 3*).

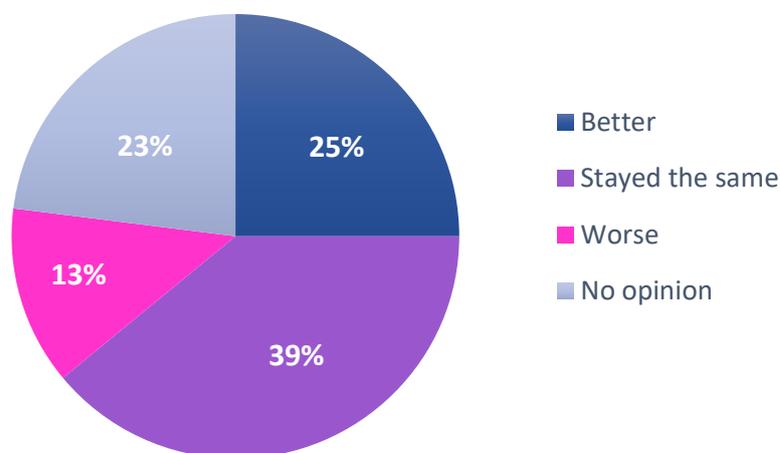


Figure 3. Perceived changes in Arts Council effectiveness (Base: n = 857)

Overall, the majority of stakeholders are *positive* towards the Arts Council's **performance as an organisation** ($n = 663$, 78%; $\bar{x} = 3.9/5^2$; 2015: 75%, +3%).

- Most stakeholders report that the Arts Council is either maintaining or improving its effectiveness from the past year ($n = 547$, 64%).

Specifically, stakeholders assessed whether the Arts Council's effectiveness has *improved* ($n = 213$, 25%), *declined* ($n = 113$, 13%) or *stayed the same* ($n = 334$, 39%; over the past year.

- **Compared to the 2015 findings**, decreases are evident in the proportion of stakeholders who feel the Arts Council is either *less effective* (2015: 20%, -7%) or *stayed the same* (2015: 41%, -2%) over the past 12 months.
- At the same time, an increase is evident in the proportion of stakeholders who report the Arts Council's effectiveness *has got better* (2015: 22%, +3%). This indicates improvements on these measures.

² \bar{x} refers to the arithmetic average or mean. Here, and throughout the executive summary, the average is shown in comparison to the maximum possible value for the given scale. For example, an average of three out of a maximum possible score of five is shown as 3/5.

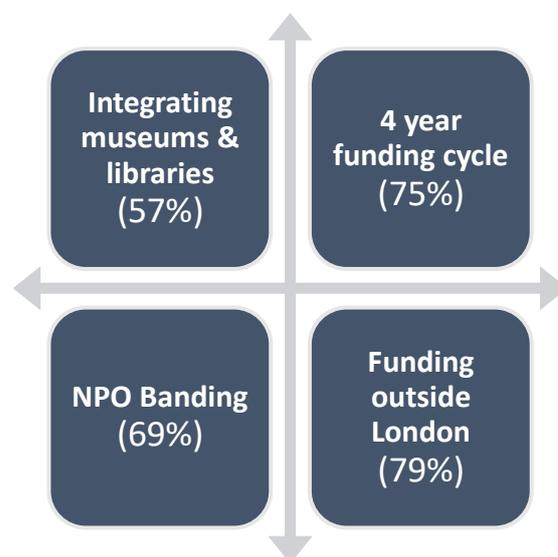
Goals & Priorities

- Most stakeholders report having a good **understanding of the Arts Council's goals and priorities** ($n = 679$, 88%), consistent with 2015 findings (88%).
- Most stakeholders also attribute a **strong mission focus** to the Arts Council ($n = 612$, 78%; 2015: 75%, +3%) and a good understanding of the **plan or strategy behind this mission** ($n = 555$, 71%; 2015: 66%, +5%).
- Stakeholders indicate that the Arts Council's **goals and priorities are relevant to the wider public and meet their needs** ($n = 471$, 60%; 2015: 59%, +1%).
 - However, a lower proportion of stakeholders feel that the Arts Council sets its goals and priorities based on the **needs of artists and cultural organisation** ($n = 359$, 46%; 2015: 45%, +1%).
 - Stakeholders cite the **Arts Council's effectiveness in advocacy** (i.e. making a case for continued public investment) as one of the major reasons they had reported improvement in effectiveness over the past year ($n = 133$, 62%).

Making a difference

The Arts Council introduced changes in the National Portfolio 2018-22 investment cycle:

- Most stakeholders agree that the changes from a **3 to 4-year funding cycle** ($n = 756$, 75%, $\bar{x} = 4.14/5$), **introduction of banding for NPOs** ($n = 685$, 69%, $\bar{x} = 3.92/5$), and **rebalancing funding outside of London** ($n = 809$, 79%, $\bar{x} = 4.13/5$) will make a *positive* difference.
- However, there is much lower level of agreement about whether **integrating museums & libraries into the National Portfolio** ($n = 738$, 57%, $\bar{x} = 3.63/5$) will make a positive difference in this investment cycle.



The Arts Council aims to make a positive difference for arts and culture in England:

- Most stakeholders agree that the Arts Council **makes a positive difference to arts and culture across England** ($n = 766$, 91%; 2015: No change), in **stakeholders' regions** ($n = 713$, 85%; 2015: 80%, +5%) and **local areas** ($n = 634$, 75%; 2015: 61%, +14%).

- While there is a much lower overall agreement with the view that the Arts Council makes a positive difference for arts and culture **internationally** ($n = 308$, 37%; see *Figure 4*), agreement on this measure has increased compared to 2015 findings (31%, +6%).

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

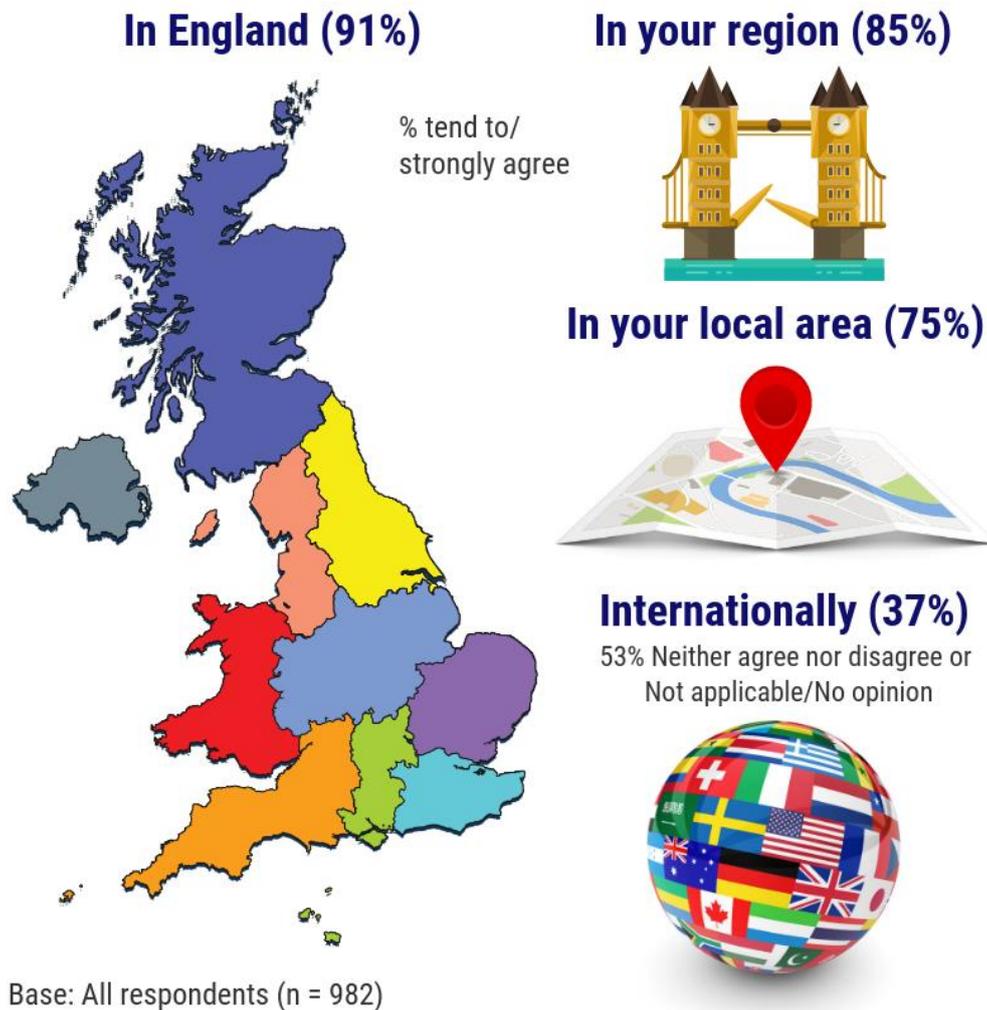


Figure 4. Stakeholders' views of the Arts Council making a positive difference to arts and culture on the local, regional, national and international level

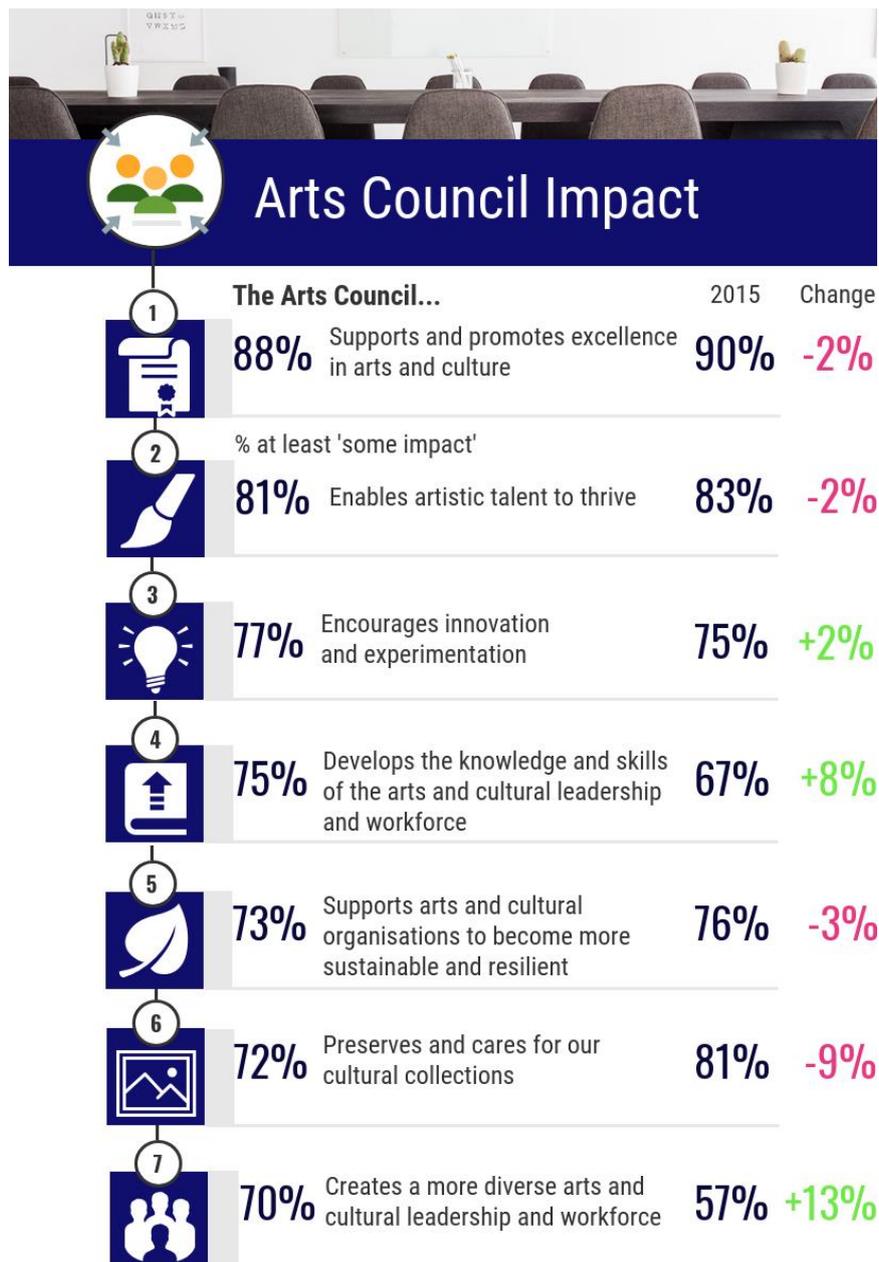
Sector Impact

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 5*).

Overall

The Arts Council aims to have a positive impact in the arts and culture sector:

- Most stakeholders indicate the Arts Council's makes an impact by **supporting and promoting excellence** ($n = 704$, 88%, $\bar{x} = 3.3/4$), **enabling more people to experience and be inspired by arts and culture** ($n = 705$, 87%, $\bar{x} = 3.3/4$) and **enabling artistic talent to thrive** ($n = 655$, 81%, $\bar{x} = 3.1/4$).



Base: All respondents ($n = 982$)

Figure 5. Arts Council impact in key areas of activity

- Additionally, most stakeholders indicate that the Arts Council has an impact by encouraging **innovation and experimentation** ($n = 619$, 77%, $\bar{x} = 3.05/4$), supporting stakeholders to become **more sustainable and resilient** ($n = 591$, 73%, $\bar{x} = 2.97/4$), and by developing a more **diverse leadership and workforce** ($n = 563$, 70%, $\bar{x} = 2.89/4$) in the sector.
 - Furthermore, the majority of stakeholders indicate that the Arts Council has a *positive* impact by encouraging the arts and culture sector to **better reflect the diversity of contemporary England** ($n = 640$, 80%, $\bar{x} = 3.06/4$) and elicit **greater public awareness and enthusiasm about arts and culture** ($n = 629$, 78%, $\bar{x} = 3.01/4$).
 - Most stakeholders indicate this influence extends to creating **more opportunities for children and young people to experience arts and culture** ($n = 595$, 74%, $\bar{x} = 2.98/4$) and providing greater **access to knowledge and learning experiences** ($n = 581$, 73%, $\bar{x} = 2.89/4$) across England (see *Figure 6*).

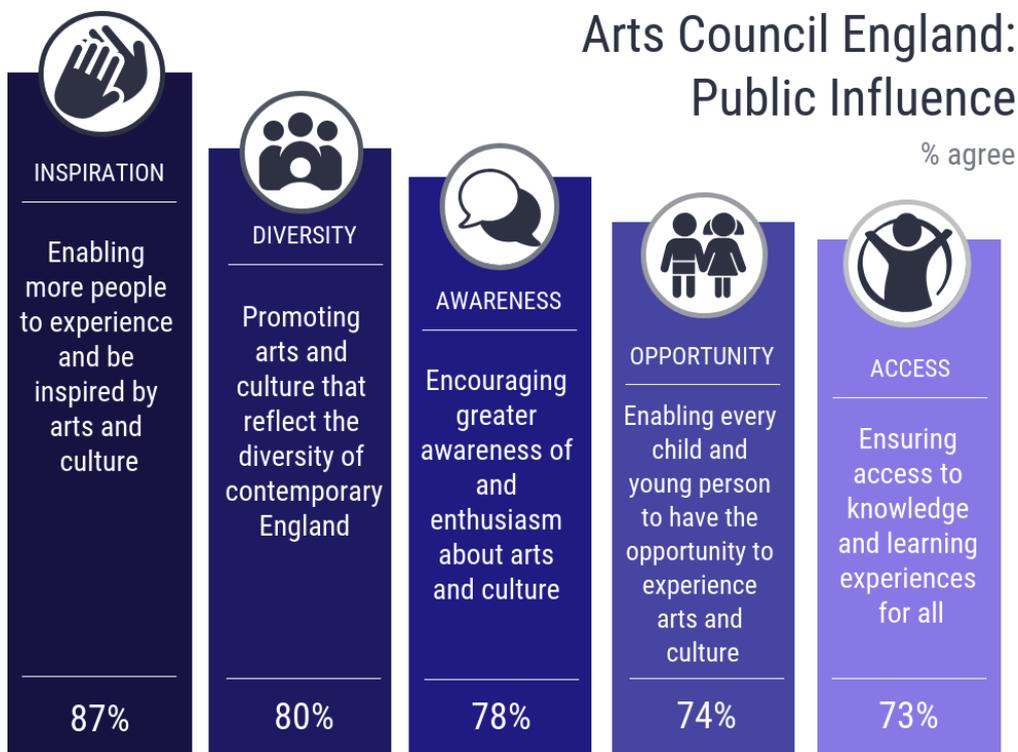


Figure 6. Arts Council Influence on the wider public (Base: $n = 982$)

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 7).



Figure 7. Working relationship quality and Openness with stakeholders

Overall

The Arts Council seeks to maintain constructive working relationships with its stakeholders:

- Most stakeholders report that the quality of their **working relationship with the Arts Council** is *good* ($n = 658$, 81%, $\bar{x} = 4.14/5$), consistent with 2015 results (79%, +2%).

Change in relationship

- Regarding how relationships with the Arts Council have changed over the past 12 months, the majority of stakeholders perceive *no change* ($n = 429$, 52%, *Figure 8*). More stakeholders report an *improvement* in their relationship ($n = 260$, 32%) than those who indicate a *decline* ($n = 79$, 10%).

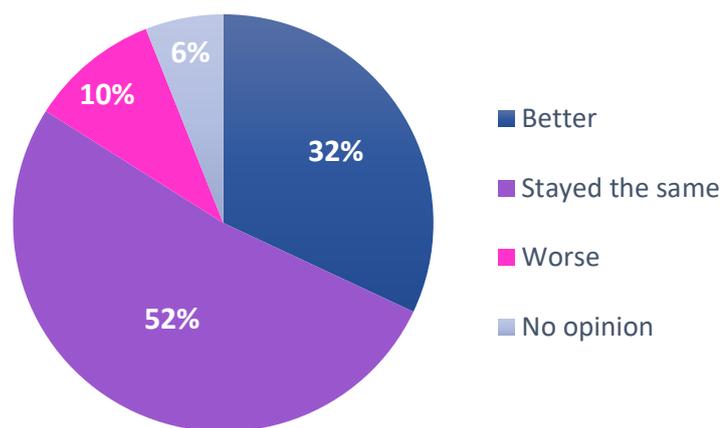


Figure 8. Perceived changes in relationship quality (Base: $n = 825$)

- A higher proportion of stakeholders agree that the Arts Council **seeks feedback from stakeholders and partners** ($n = 573$, 74%) compared to 2015 (64%, +10%).
- In addition, more stakeholders indicate **confidence in the Arts Council's decision-making capabilities** ($n = 510$, 66%) than in 2015 (58%, +8%).
 - There is a small increase evident in the proportion of stakeholders who feel the Arts Council is **not afraid to challenge them** ($n = 549$, 71%) compared to 2015 (65%, +6%).
 - There is also a small increase in the proportion of stakeholders that feel the Arts Council listens to and understands their views ($n = 387$, 49%), compared to 2015 findings (45%, +4%). Likewise, most stakeholders feel **the Arts Council is open and honest** with its stakeholders and partners ($n = 475$, 61%), also indicating improvement from the 2015 results (52%, +9%).
 - A higher proportion of stakeholders agree the Arts Council has an impact in each of these domains compared to 2015 findings. This indicates an **overall improvement in stakeholder perceptions** on this set of measures.

Engagement with Stakeholders

- Respondents indicate the most common method of engagement with the Arts Council is through their **relationship manager** ($n = 385, 47\%$).
- Results suggest that it is *very important* to have a **regular point of contact**, such as a relationship manager:
 - Amongst stakeholders who do **not** have a regular point of contact ($n = 147, 18\%$), a much lower proportion rate the quality of their working relationship with the Arts Council as *fairly* or *very good*: 47% 'good' for those **without** a regular contact versus 82% 'good' for those **with** a regular contact.
- The stakeholder groups with the highest proportion who report that they lack a regular point of contact are **arts individuals** ($n = 48, 46\%$) and **non-NPO museums** ($n = 12, 57\%$).
- When it comes to getting the **right amount of contact with the Arts Council**, more than half indicate satisfaction with their **current level of contact** ($n = 394, 52\%$).
 - Where stakeholders would like a different level of contact, a greater proportion say they would prefer **more contact in the future** ($n = 288, 38\%$) than the proportion wanting **less contact** ($n = 45, 6\%$, see *Figure 9*).

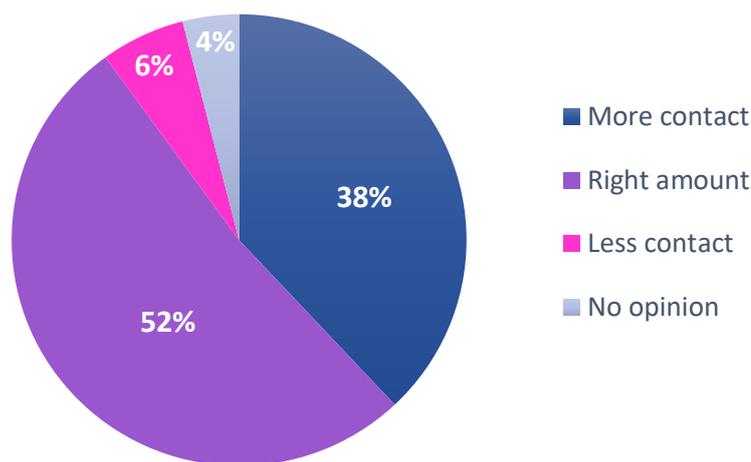


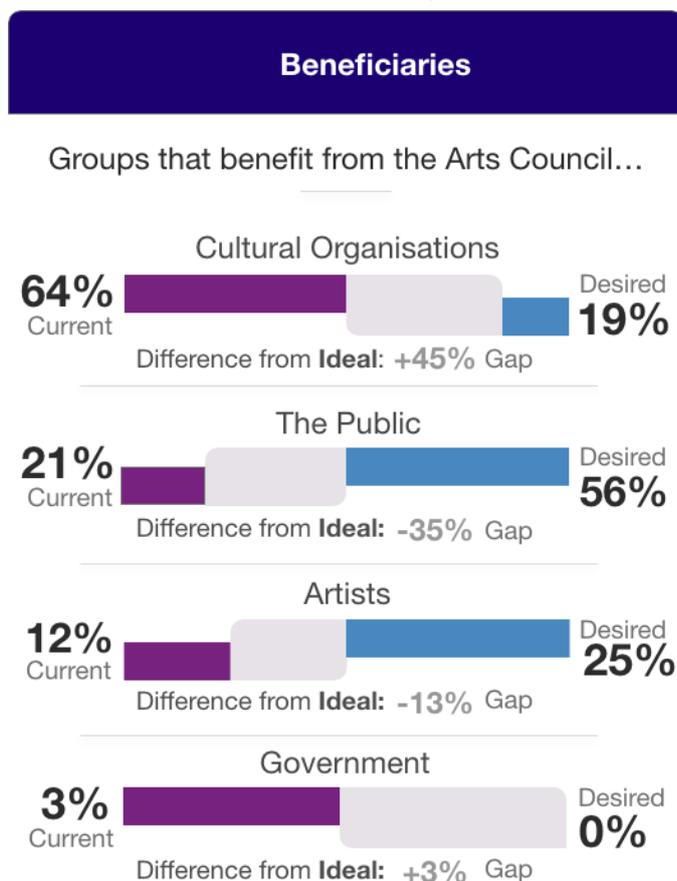
Figure 9. Preferred amount of contact with the Arts Council (Base: $n = 757$)

Beneficiaries of Arts Council investment

The perception of fairness in the distribution of Arts Council investment across key categories of stakeholders and society comprises an important metric (see *Figure 10*).

- Stakeholders think the groups that currently benefit most from the Arts Council's work include **cultural organisations** (64%), the **public** (21%), and **artists** (12%).
- Rating the groups that stakeholders feel should benefit most yields a different order of priority: **public** (56%), **artists** (25%), and **cultural organisations** (19%).
 - Very few stakeholders believe the government benefits from Arts Council investment (3%) and none believe it should.

Figure 10. Current, ideal beneficiaries of Arts Council investments (Base: n = 982)



Communication

Stakeholders are mostly positive in their assessment of Arts Council communications. Furthermore, most stakeholders feel well-informed through appropriate channels of communication.

Overall

To foster a good relationship with its stakeholders, the Arts Council aims to keep them informed about its work and broader developments:

- Most stakeholders report that **the Arts Council keeps them well informed** ($n = 620$, 86%, $\bar{x} = 3.13/4$). This is an increase compared to 2015 (77%, +9%).
- Only 13% of stakeholders indicate they are **not well informed** ($n = 95$).

Amount of information

- The majority of stakeholders report they receive the **right amount of information** ($n = 481, 62\%$).
- Whereas, a minority of stakeholders indicate that they receive either a **limited amount of information and would like more** ($n = 178, 23\%$) or **more information than is useful** and want less ($n = 65, 8\%$, see *Figure 11*).

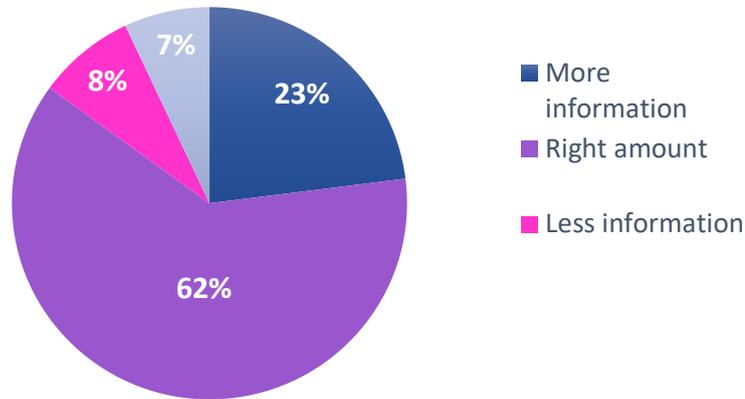


Figure 11. Amount of information received (Base: $n = 775$)

Communication Channels

- Of all the available communication channels, a large majority of stakeholders consider personal **contact with relationship managers** to be the most useful ($n = 591, 76\%$, see *Figure 12*).

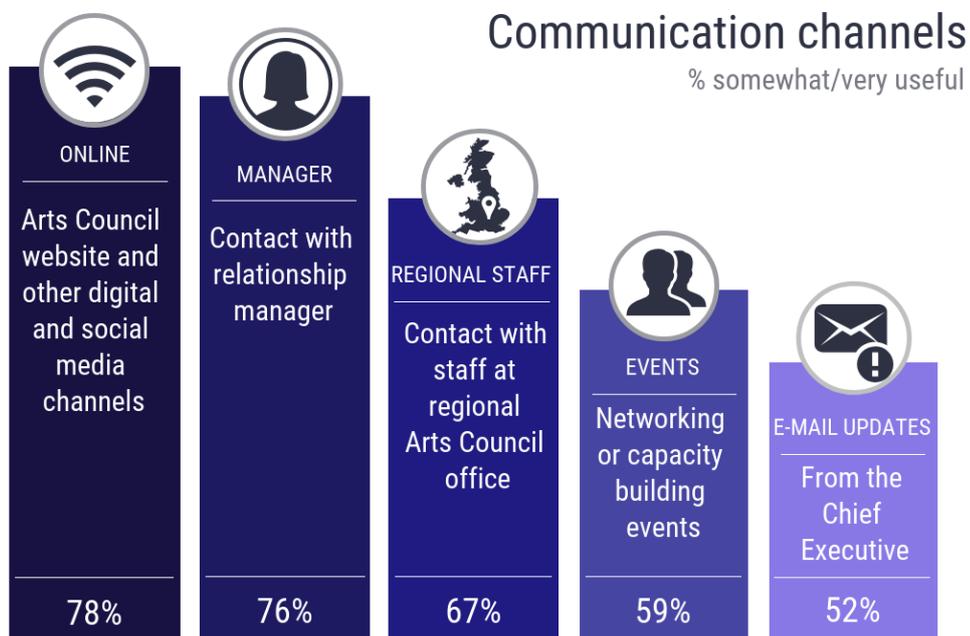


Figure 12. Usefulness of communication channels (Base: $n = 982$)

- The most significant improvement evident in the 2018 survey results on communication channels relates to stakeholder views on the Arts Council's **website and other digital channels** ($n = 600, 78\%$), which a higher proportion of respondents considered to be useful compared to 2015 findings (58%, +20%).
 - This suggests that stakeholders have experienced improvements over the last three years in the Arts Council's use of digital communication channels.
- Stakeholders also report that **networking and capacity building events** ($n = 451, 58\%$, 2015: 44%, +14%) and **email updates from the chief executive** ($n = 397, 52\%$; 2015: 35%, +17%) are *useful* communication channels.

Communication Clarity

The Arts Council aims to keep interactions with stakeholders clear, coherent and consistent to ensure shared understanding and underpin effective working relationships. Most stakeholders report positive views about specific dimensions of Arts Council communication, as shown below (see *Figure 13*):

- Most stakeholders indicate that the Arts Council's goals and **priorities are clear and easy to understand** ($n = 573, 73\%$; 2015: 70%, +3%) and report that the Arts Council is a **useful source of intelligence that facilitates their work** ($n = 474, 62\%$; 2015: 51%, +11%).
- On most dimensions of communication, stakeholders indicate little change in the Arts Council's performance. For instance, the proportion of stakeholders who indicate that **the Arts Council is not always clear about what it stands for** ($n = 188, 24\%$) is comparable to 2015 (27%, -3%).

Figure 13. Clarity of Arts Council communications (Base: $n = 982$)



Partnerships

In assessing Arts Council partnership working, stakeholders are generally positive or neutral in their views.

Overall

Below is a summary view of key metrics on the quality of Arts Council partnership working (see Figure 14):

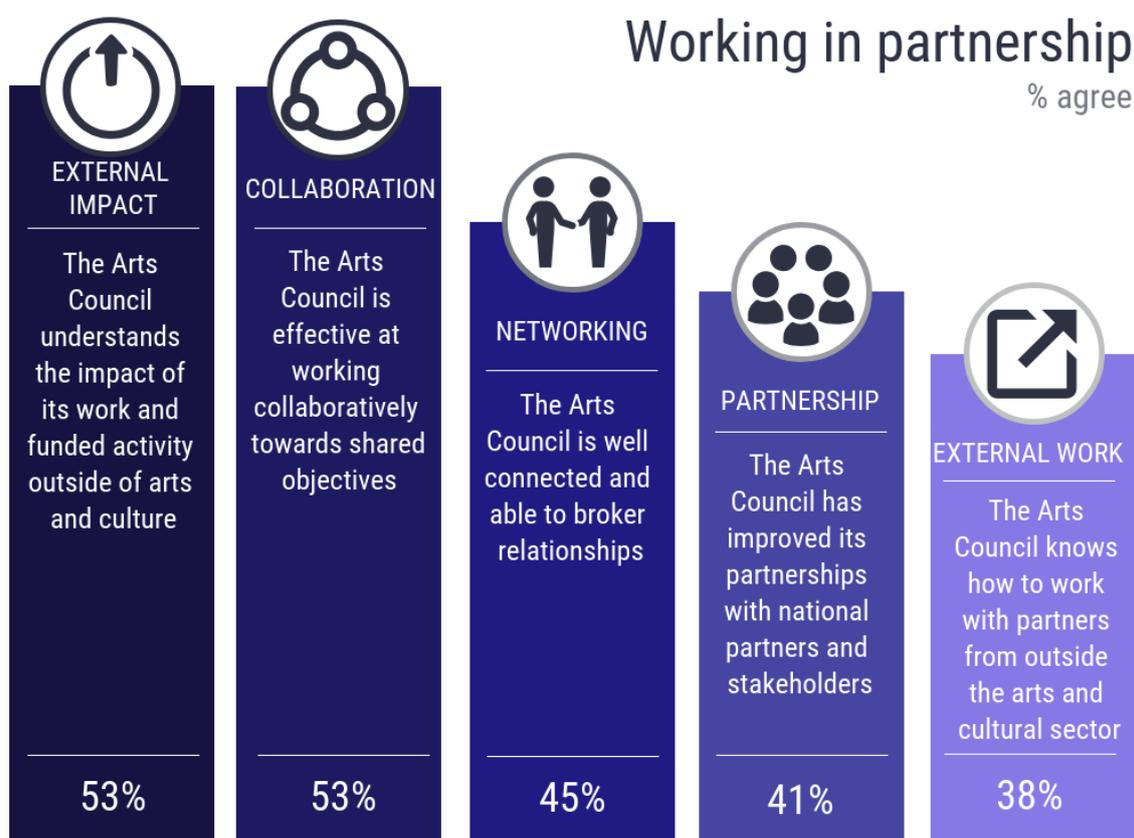


Figure 14. Stakeholder perceptions of the Arts Council's partnership work (Base: $n = 982$)

- The majority of stakeholders indicate that the Arts Council understands the impact of its **work and funded activity outside of arts and culture** ($n = 398$, 53%) and that it is **effective at working collaboratively towards shared objectives** ($n = 400$, 53%). Both ratings show considerable improvement compared to 2015 findings (2015: 42%, +11%, and 2015: 31%, +22%, respectively).
- A substantially higher proportion of stakeholders also report that the Arts Council is **well connected and facilitates relationships** ($n = 339$, 45%; 2015: 36%, +9%) and has improved its **partnerships with stakeholders and national partners** ($n = 318$, 41%; 2015: 35%, +6%)

- To a lesser extent, stakeholders also recognize the Arts Council’s capacity to **work with partners from outside the arts and cultural sector** ($n = 287$, 38%), representing an increase on 2015 findings (24%, +14%).
- The majority of stakeholders also **respect how the Arts Council goes about its work** ($n = 593$, 78%) and have **confidence in the current leadership of the Arts Council** ($n = 518$, 69%, see *Figure 15*), showing substantial increases from the previous survey (2015: 66%, +12% and 2015: 45%, +24%).
- Stakeholders are positive about their relationship with the Arts Council. With a majority indicating it is based on **mutual understanding and benefit** ($n = 499$, 66%; 2015: 64%, +2%) and trust that the Arts Council can make **bold decisions in the interest of the arts and culture in England** ($n = 397$, 51%; 2015: 44%, +7%).



Figure 15. Respect and confidence in Arts Council work and leadership (Base: $n = 982$)

Accountability and trust

As an investor of public funds, perceptions of accountability and trustworthiness are particularly important to the Arts Council.

Overall

Indeed, while most stakeholders take a positive view on Arts Council investment decision-making, some stakeholders still express scepticism that the Arts Council is **demonstrating value** (52% positive; 22% negative) and **explaining investment decisions** (57% positive; 18% negative) adequately (see Figure 16).

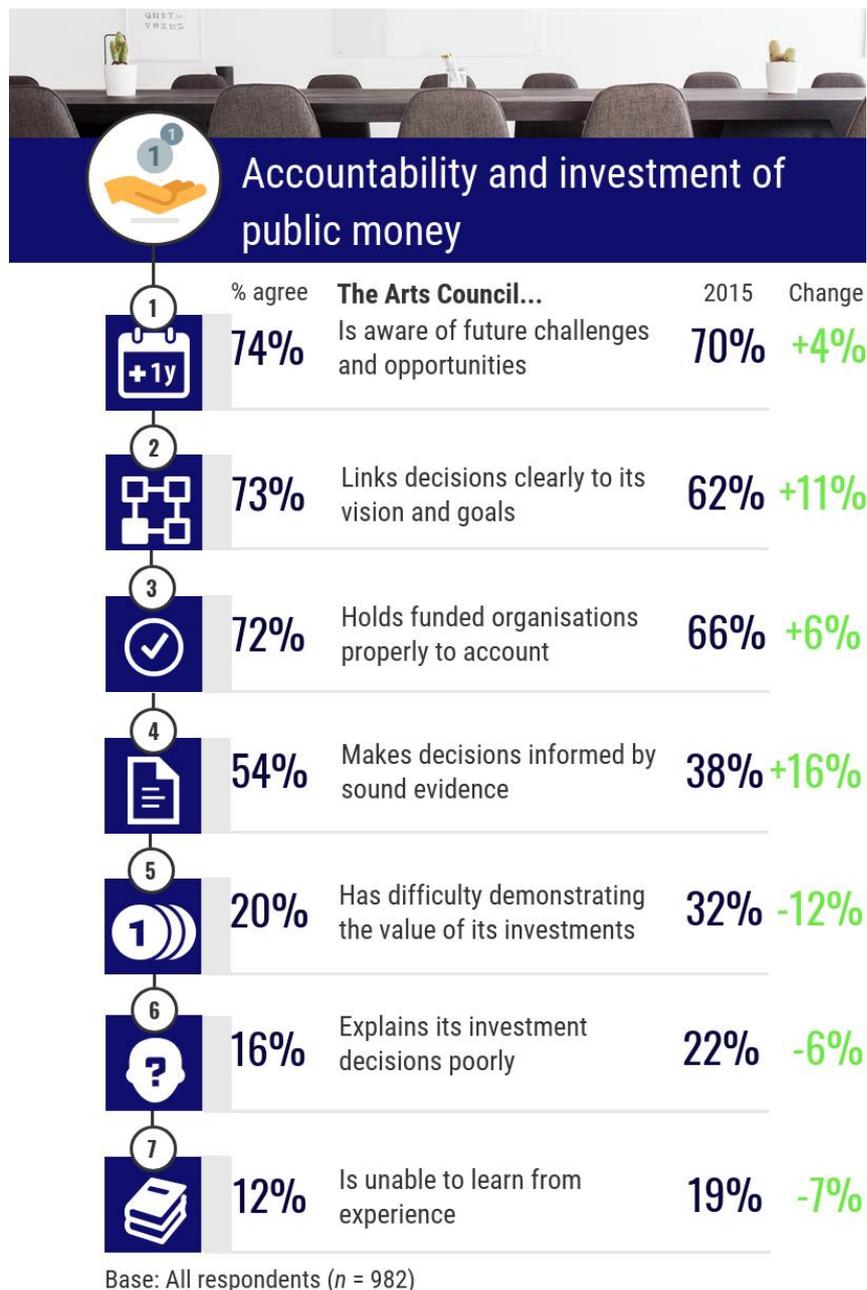


Figure 16. Arts Council investment decisions and accountability

Investing Public Money

The Arts Council is a public body which invests public money in the arts. Indeed, the Arts Council aims to demonstrate the value of investments to stakeholders, supervisory bodies and the wider public:

- The proportion of stakeholders who *agree* that the Arts Council is **capable of demonstrating the value of its investments** is still below 50% ($n = 351$, 47%) but this has increased since the last survey in 2015 (2015: 31%, +16%).
- While a notable minority of stakeholders *disagree* on this metric ($n = 142$, 19%), there is an evident improvement compared to 2015 (32%, -13%).

An awareness of the current reality and landscape for the sector helps inform future investment approaches:

- Overall, most stakeholders *agree* the Arts Council meets expectations on their **awareness of future challenges and opportunities** ($n = 556$, 74%; 2015: 70%, +4%) and that **funded organisations are held accountable** ($n = 543$, 72%; 2015: 66%, +6%).

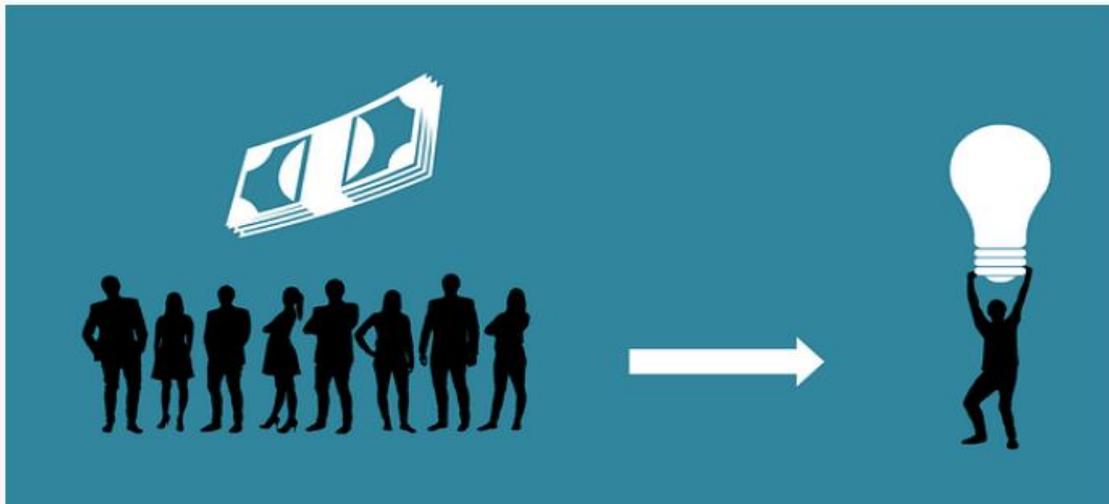
The survey results indicate that the Arts Council has been successful in showing that its investment decisions connect to its vision and objectives:

- Most stakeholders indicate their *agreement* that Arts Council's **decisions are linked to their vision and goals** ($n = 548$, 73%; 2015: 62%, +11%)
- A low proportion of stakeholders feel that Arts Council decisions are **poorly explained** ($n = 125$, 16%; 2015: 22%, -6%).
- Most stakeholders believe the Arts Council's decisions are **informed by sound evidence** ($n = 408$, 54%), with improvement on this metric evident compared to the previous survey results (2015: 38%, +16%).

Role as a Trusted Stakeholder

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 17*).

- The majority trust the Arts Council to **make the case for public funding of the arts** ($n = 649$, 86%) and to **invest intelligently in arts and culture** ($n = 585$, 75%).
- Likewise, stakeholders trust the Arts Council to **share information about connections and opportunities** ($n = 547$, 73%) and to **operate independently of government** ($n = 520$, 70%).



Advocacy and investment

- **86%** trust the Arts Council to make the case for public funding of the arts



- **75%** trust the Arts Council to invest intelligently in the arts and culture

Networking and independence

- **73%** have confidence in the Arts Council's ability to share information about connections and opportunities



- **70%** trust the Arts Council to operate independently of government

Figure 17. Stakeholders' trust in the Arts Council's advocacy role (Base: n = 982)

Investment and funding processes

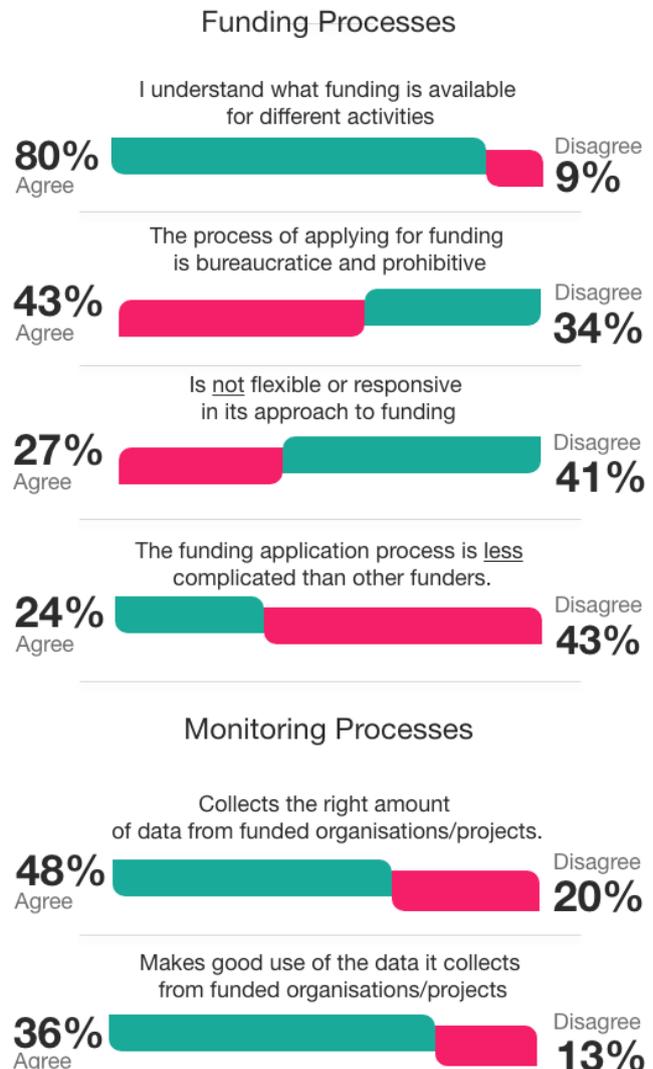
The Arts Council is responsible for investing public funds in the arts and culture sector. Stakeholders are mostly positive in their assessment of Arts Council investments and funding processes.

Overall

The survey evaluates stakeholder attitudes about the Arts Council's approach to fulfilling this important role (see *Figure 18*).

- Stakeholders report that they are informed about the various types of projects that are funded by the Arts Council. A majority of stakeholders indicate that they **understand what funding opportunities are available** for different activities ($n = 590, 80\%$), similar to 2015 results (74%, +6%).
- Stakeholder views about **monitoring processes** also skew towards the positive, while there are more negative perceptions around trust in the processes for **awarding funding** at the Arts Council.

Figure 18. Stakeholder views about the Arts Council's funding and monitoring processes (Base: $n = 982$)



Fairness and transparency

The Arts Council strives for transparency and accountability in its funding and investment:

- Most stakeholders *agree* ($n = 414, 55\%$) the funding decision-making process is **fair and transparent**, while similar proportions *disagree* ($n = 148, 20\%$) with those who are *neutral* ($n = 152, 20\%$).
- National Portfolio** ($n = 208, 58\%$) and **Grants for the Arts applicants** ($n = 138, 55\%$) share a similar level of positive appraisal.
 - A *positive* indicator on this metric is an increased proportion of GFTA applicants perceive the process as fair compared to 2015 (48% positive sentiment on this measure, +7%).

Application process

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 19*):

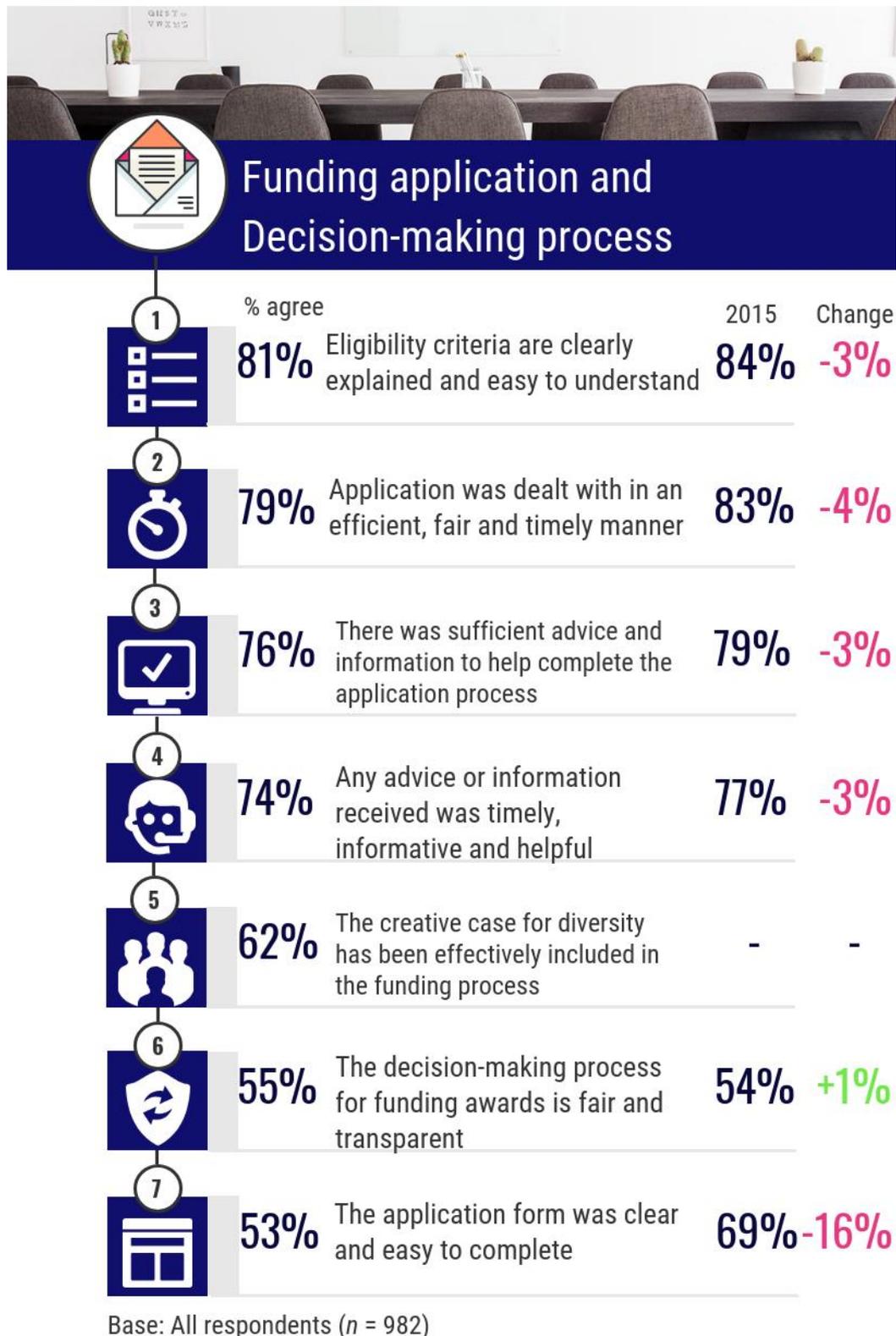


Figure 19. Arts Council funding application and decision-making process

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- Most stakeholders report that eligibility criteria are **clearly explained and easy to understand** ($n = 611$, 81%). Likewise, most stakeholders agree that applications are dealt with in an **efficient, fair and timely manner** ($n = 593$, 79%).
 - Funding applicants take a positive view of the support they receive during the application process:
 - Stakeholders indicate there is **sufficient advice and information** to help them complete the application process ($n = 575$, 76%). In addition, stakeholders *agree* that funding application advice, or information, they receive is **timely, informative and helpful** ($n = 553$, 74%).
 - Most NPO applicants ($n = 307$, 86% agree versus $n = 20$, 5% disagree) and GFTA applicants indicate that their **application was dealt with in an efficient, fair and timely manner** ($n = 202$, 81% agree, versus $n = 25$, 10% disagree).

Funding application forms garner a less enthusiastic response from stakeholders than the overall application process:

- While about half ($n = 397$, 53%) indicate the application form they needed to do was **'clear and easy to complete'**, ($n = 210$, 28%) *disagree*. These proportions show an increase in negative sentiment about the clarity and ease of the application form compared to 2015 (when 69% took a *positive* view versus 17% *negative*).
- Applicants with **less than one year of contact with the Arts Council** (43% negative [Base: $n = 54$]; 2015: 33% *negative*) are most likely to report that the application form is *difficult*, followed by **Grants for the Arts applicants** (38% *negative* [Base: $n = 247$]) and **National Portfolio applicants** (26% *negative* [Base: $n = 359$])

Future priorities

Stakeholders in this survey provide their assessment of the most important initiatives for the Arts Council to continue. Additionally, stakeholders provide feedback on the services that the Arts Council most needs to improve.

Overall

Focusing on the next 12 months, most stakeholders indicate that **making the case for public investment** in arts and culture should be a top Arts Council priority over the next year ($n = 623$, 78%). In this way, stakeholders appreciate the Arts Council's advocacy role and see this as paramount for the sector (see *Figure 20*).

- There is strong agreement regarding the importance of the Arts Council's role in distribution of funding.
- Most stakeholders indicate that the Arts Council should prioritise a **fair, resource-efficient and geographically balanced distribution across England** ($n = 513$, 64%).



Figure 20. Arts Council future priorities (Base: $n = 982$)

Improving development services

Stakeholders want greater development support from the Arts Council (see *Figure 21*). This is evident specifically when stakeholders look ahead to the next twelve months.

In this regard, more than one-third indicate **the Arts Council should offer more support in developing their organisation** ($n = 285, 36\%$).

- Additionally, almost one-third of stakeholders express a desire for **more personal contact with the Arts Council** ($n = 229, 29\%$).
- Whereas, Grants for the Arts (GFTA) stakeholders, in particular, highlight an *increase* in personal contact is a priority ($n = 122, 48\%$).



Figure 21. Arts Council service improvements (Base: $n = 982$)