

THE
STATE
OF
THE
ARTS



CAMPAIGN
FOR THE ARTS



WARWICK
THE UNIVERSITY OF WARWICK

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Introduction

This report considers the state of the arts in the UK today, by examining five ‘health metrics’:

Arts Funding (p13)

A society in which the arts are healthy is one in which there is robust and sustained funding, from both public and private sources, so arts initiatives can grow and flourish.

Arts Provision (p47)

A society in which the arts are healthy is one in which there is an extensive and diverse cultural offering: places to go and things to do.

Arts Engagement (p57)

A society in which the arts are healthy is one in which people from all communities and backgrounds are engaging with what’s on offer and participating in the arts.

Arts Education (p75)

A society in which the arts are healthy is one in which high-quality arts education is valued and available to all, fostering creativity and developing the artists and audiences of the future.

Arts Employment (p93)

A society in which the arts are healthy is one in which people can sustain a decent living from their work creating or supporting art.

These ‘health metrics’ are interconnected. An arts employment can follow from an arts education, which can stem from an arts engagement, which can hinge on local arts provision, which can depend on the availability of arts funding.

Executive Summary

The United Kingdom has a good claim to being a ‘state of the arts’, recognised around the world for its vibrant culture and heritage.

The State of the Arts report lays bare the challenges the UK now faces to maintain and enhance this – at a time when the arts are under huge pressure, but also have huge potential to transform lives, society and the economy for the better.

There have been dramatic falls in arts **funding** since 2010. Tax relief for the creative industries has surged, but core public funding for the UK’s Arts Councils and the BBC has fallen, and investment by local councils has plummeted. Despite high public **engagement** with the arts, especially post-pandemic, cultural **provision** has contracted and remains fragile. Arts **education** faces critical challenges, from unequal opportunities in early years to course closures in universities nationwide. Reduced funding and a marginalisation of the arts in English state schools has driven catastrophic declines in participation and enrolment. **Employment** in the Cultural Sector has been growing, but significant wage disparities and job precarity threaten the long-term sustainability of the sector and the countless benefits it brings.

This report underscores the need for better and more balanced support to ensure the vitality and accessibility of the arts for everyone, across all parts of the UK.

Key findings

Funding

- **The UK has one of the lowest levels of government spending on culture among European nations**, and was one of a small minority of countries to reduce total culture spending per person between 2010 and 2022.
- Between 2009-10 and 2022-23, per person in real terms:¹
 - » **Local government revenue funding** of culture and related services **decreased by 29% in Scotland, 40% in Wales and 48% in England**, alongside rising cost and demand pressures on statutory services (especially social care).
 - » The Department for Culture, Media and Sport (**DCMS**)’s core funding of cultural organisations **decreased by 18%** to only 0.17% of total public spending per person.
 - » The **Arts Councils**’ core Government funding **decreased by 18% in England, 22% in Scotland, 25% in Wales and 66% in Northern Ireland**.
- Over the same period:
 - » **Tax relief for the creative industries increased by 649%**. In 2017-18 this investment exceeded the DCMS’ core funding of cultural organisations for the first time.
 - » The **BBC**’s total public and grant funding **decreased by 23%**.
 - » **National Lottery grant funding** for arts and heritage projects **increased by 19%**, but fluctuated considerably over the period and was lowest at the start of the pandemic.
 - » The income mix of **Arts Council England**’s ‘**National Portfolio**’ changed significantly. **Public funding went down by 10 percentage points**, while contributed income (from private donations/ sponsorship) and earned income both went up by 5 percentage points.
- Between 2009-10 and 2020-21, per person in real terms, spending on British **public libraries fell by 53%**.

Provision

- From an analysis of almost a million listed events between 2018 and 2023, **many venues, producers and promoters have scaled back their operations or shut down**. There was a **23% fall in the number of music, theatre, dance and comedy events in the UK**.
- The number of events **grew by 5 percentage points in 2019**, then **collapsed by 91 percentage points in 2020**.
- The number of events increased by only 2 percentage points between 2022 and 2023, suggesting **post-pandemic recovery is incomplete and yet slowing**.
- **Across venues of all sizes, there were fewer events** in 2023 than in 2018.
- Between 2018 and 2019, growth in event numbers was driven entirely by **small venues**. In 2023 there were 24% fewer events in these venues and average **ticket prices were 22% lower in real terms**.
- **Extra-large venues** saw the **biggest drop in event numbers** in 2020 but **made the strongest post-pandemic recovery**, while also **increasing ticket prices** as inflation rose.
- The number of **cinemas** in the UK **increased by 18% between 2014 and 2020**, but has since **fallen by 2% every year**.

Engagement

- **91% of adults in England engaged with the arts** in person between October 2022 and December 2023, and **77% attended events**.
- **88% of adults in Scotland were culturally engaged** between March 2020 and March 2022, and **74% attended cultural events or places** despite the impacts of the pandemic.
- **71% of adults in Northern Ireland** and **64% of adults in Wales** attended arts events between April 2021 and March 2023.
- **Films** and **cinemas** generate the biggest share of arts attendances in all four UK nations.
- There are **significant arts engagement gaps** between **disabled adults** and the population as a whole. However, engagement by disabled people increased by 6 percentage points over the 2010s in England.

- In some parts of the UK, there are **significant arts engagement gaps** between adults from **ethnic minorities** and the population as a whole. However, in Scotland arts participation (excluding reading) is five percentage points higher among 'minority ethnic groups'.

Education

- All 4 nations recognise the importance of the arts in early years, but **access to quality pre-school education is unequal**.
- **Arts education in England has experienced a significant decline**, caused by funding pressures and performance measures, like the 'EBacc' and 'Progress 8', **marginalising the arts in state-funded secondary schools**.
- The number of **arts teachers** in English state-funded secondary schools **fell by 27%** between 2011 and 2024, from 55k to 40k.
- The number of **hours of arts teaching** in English state-funded secondary schools **fell by 23%** between 2011 and 2024, from 501k to 387k.
- Between 2013 and 2020 in England, **school arts engagement** among 11-to-15 year olds **fell by 23% for arts and crafts, 24% for drama, 26% for music and 29% for dance**.
- Since 2010 the share of **GCSE entries in arts subjects has declined by 47%**.
- Since 2010 the share of **A-level entries in arts subjects has declined by 29%**.
- Arts and creative courses are increasingly at risk from a **structural funding crisis in Higher Education**.
- Since 2021 in England, the Government has **segregated arts subjects from other, 'strategically important' subjects** in Higher Education, and imposed **50% cuts in 'high cost subject' funding**.

Employment

- The **Creative Industries have consistently grown faster than the UK economy** as a whole.
- The **Cultural Sector generally grew faster than the UK economy** over the 2010s, but the **drop in Gross Value Added (GVA) as a result of the pandemic** (10.6%) was more than double that of the Creative Industries (4.9%).
- The distribution of GVA by region shows the Cultural Sector in **Yorkshire and The Humber, the South West and Northern Ireland in overall decline** since 2010.
- **Scotland has seen unprecedented GVA growth** since the pandemic that far outstrips London which otherwise dominates.
- Despite significant growth in GVA, **median (PAYE) earnings in the Cultural Sector are consistently below the UK median** for every sub-sector with the exception of Film, TV and Music.
- **Earnings for Cultural Education are below the poverty line.**
- Median earnings in the **North East are less than half the median earnings for the sector in the North West.**
- On average **men are paid 28% more than women** in the Cultural Sector. In the Crafts sub-sector the disparity rises to 70%.
- The **number of jobs filled in the Cultural Sector rose by 33%** between 2011 and 2022.
- The **precarity of freelance work, low wages, and unequal distribution of wealth and work** raises questions for the sustainability of the Cultural Sector in the longer-term. This is particularly relevant for those from lower socio-economic groups who do not have additional financial means to develop and support a career in the sector.

What do we mean by ‘the arts’?

In considering the state of the arts, we have had to analyse sources in which ‘the arts’ are categorised and considered in different ways and to different extents.

Where choices have had to be made, we have erred on the side of a broad, inclusive definition.

We do not divorce heritage, libraries or media from our consideration of ‘the arts’. This is partly due to their inseparability from other arts within much cultural policy and funding. It is also on principle: because so much of our heritage and historic environment is an artistic inheritance; our libraries are gateways to literature just as concert halls and gig venues are gateways to music; our public service broadcasters are cultural organisations supporting artistic expression and engagement.

The arts are deeply interwoven, not only with each other but with the broader fabric of society. New art mediums are constantly emerging and evolving alongside new technologies, shifting and developing our understanding of ‘the arts’.

Our approach is to acknowledge and embrace this dynamism. ‘The arts’ are not static, and neither is our definition of them.

Advisory notes

This report considers the period from 2010 to 2023. Wherever possible, we have analysed official statistics. Where data is not available for the period in its entirety, data that is available within this range is used.

The Covid-19 pandemic had far-reaching effects on the arts. We have sought to consider these as carefully as possible in our analysis. Caution is advised when comparing annual data from before and after 2019-20.

This report aims to provide a national snapshot – either at the level of the United Kingdom or its four constituent countries. More localised case studies are important to consider alongside our analysis, and may not always follow national trends.



"I love the fact that art means different things to different people and that there are different art forms to suit everyone. The arts encourage us to express our differences through cultural experiences, allowing for diversity to shine. We are all able to express our emotions and our voices become heard. Art brings us all together."

– Laaiqah

Photograph by Ayesha Jones

Arts Funding

A society in which the arts are healthy is one in which there is robust and sustained funding, from both public and private sources, for arts initiatives to grow and flourish.

The UK's arts and cultural organisations are funded by **public** and **private** sources:

| Public funding | Private funding (from individuals, charities or private companies) | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|
| | Contributed income | Earned income |
| <ul style="list-style-type: none"> • Central and devolved government funds • Local government funds • National Lottery funds • The BBC licence fee | <ul style="list-style-type: none"> • Grants from trusts and foundations • Donations, gifts and legacies • Sponsorships | <ul style="list-style-type: none"> • Ticket sales • Food, drink and merchandise sales • Space hire |

Every organisation is different. Some don't have their own venue, so may incur costs for hiring space instead of earning income from it. Some do not receive contributed income, while others rely almost entirely on donations. Many do not receive public funding directly but still benefit from its positive impacts on the broader ecosystem.

Public funding across Europe

Every European country invests a portion of public money in the arts and culture.

The Organisation for Economic Co-operation and Development (OECD) classifies government spending so that comparisons can be made between countries. This system is known as the ‘Classification of the Functions of Government (COFOG)’.

According to the European Union’s Guide to Culture Statistics, COFOG categories 8.2 (cultural services) and 8.3 (broadcasting and publishing services) “cover a large part of culture-related government expenditure” and make it possible “to report figures specifically and totally related to culture”.²

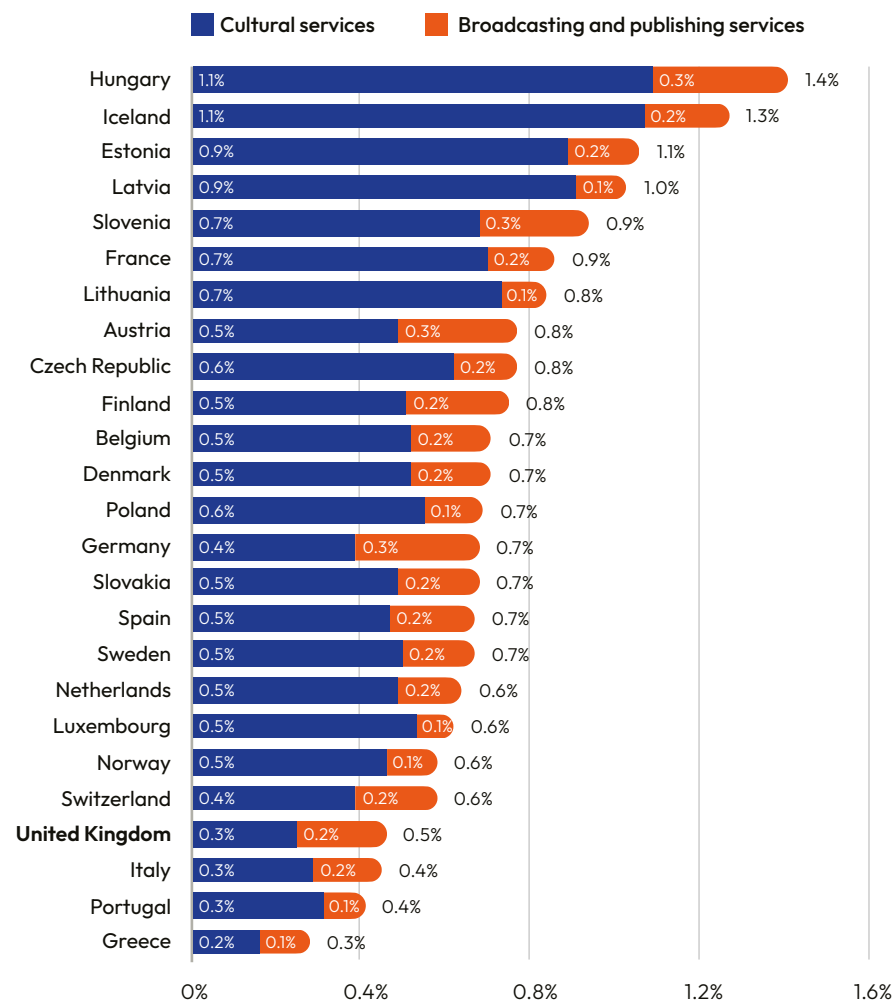
Our analysis considers European countries³ for which total (central, state and local) government expenditure data in these categories has been published by the OECD between 2010 and 2022, and for which other data⁴ is also available to calculate real-terms spend per person.

Of these countries, the United Kingdom ranks among the lowest spenders on culture, both as a percentage of GDP and per person.

Gross Domestic Product (GDP) is the total monetary value of all goods and services produced within a country over a specific period. The percentage of GDP allocated to specific areas indicates the priority and value that a country places on those areas, whether for economic investment or other reasons.

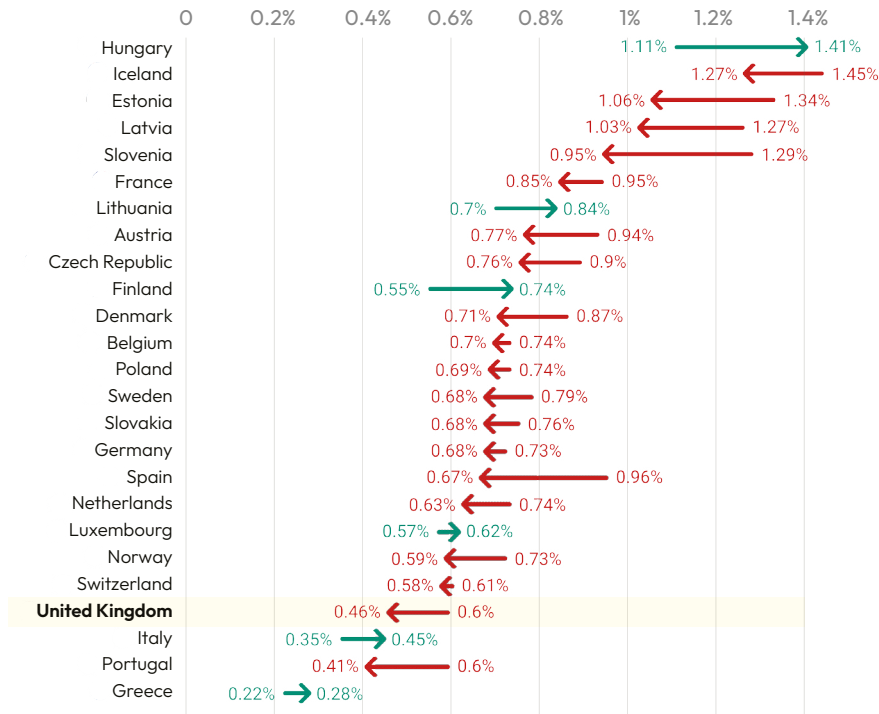
Across these countries in 2022, the mean average share of GDP invested in culture was 0.74%. In the United Kingdom it was 0.46%.

Figure 1:
Culture spending as a share of GDP, 2022,
selected European countries



Source: Analysis of OECD data (Annual government expenditure by function (COFOG); Annual GDP and components - expenditure approach). **Notes:** Expenditure and GDP in national currency. Standard valuation based on SNA/ESA.

Figure 2:
Change in total culture spending as a share of GDP,
2010 vs 2022, selected European countries

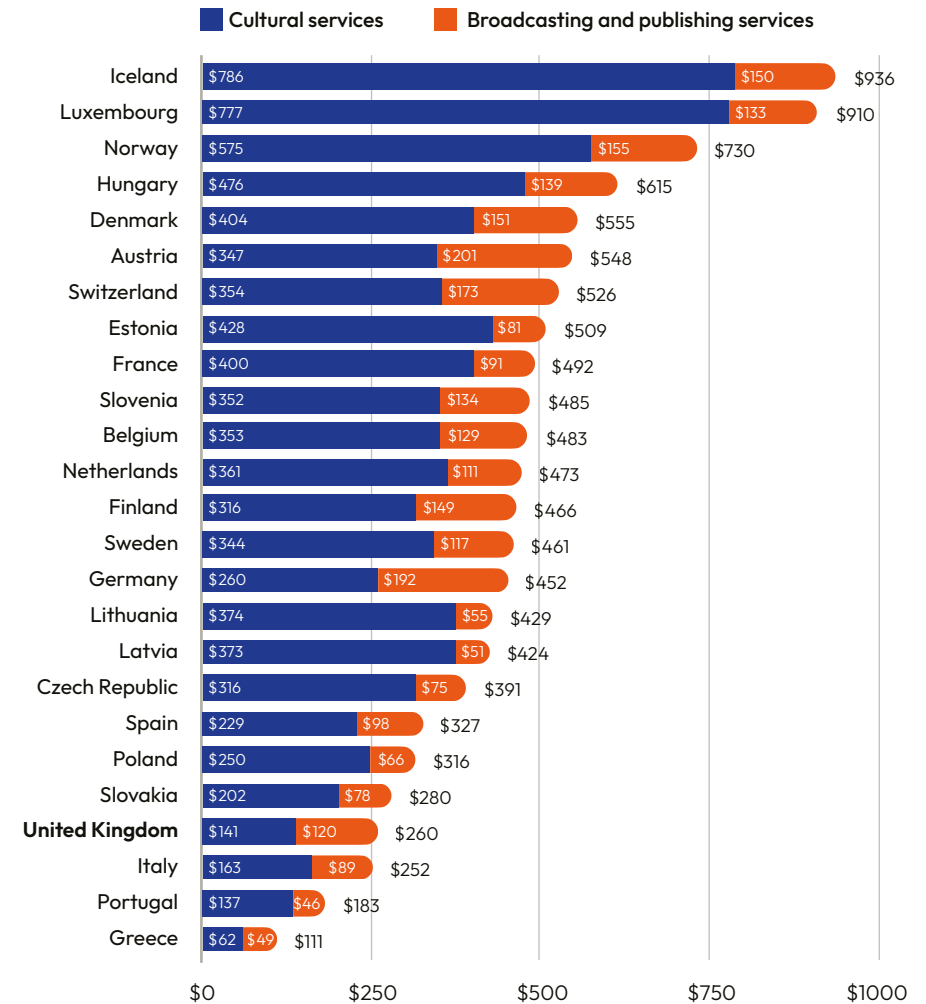


Source: Analysis of OECD data (Annual government expenditure by function (COFOG); Annual GDP and components - expenditure approach). **Notes:** Totals include categories 8.2 (cultural services) and 8.3 (broadcasting and publishing services).

Although most countries reduced culture spending as a share of GDP between 2010 and 2022, the United Kingdom did so by more than the average across these countries (-0.14 vs -0.08). This was despite the fact that the United Kingdom was already spending less on culture as a share of GDP than the average across these countries at the beginning of the period (0.6% vs 0.82%).

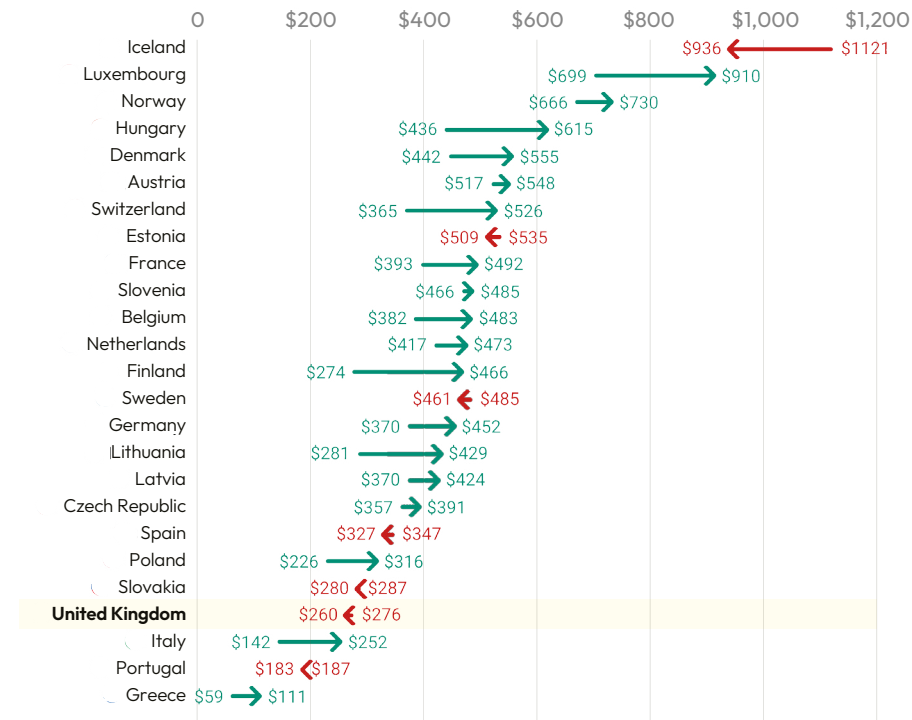
Per person, the UK was investing 44% less than the average in culture.

Figure 3:
Culture spending per person, 2022,
selected European countries



Source: Analysis of OECD data (Annual government expenditure by function (COFOG); Annual Purchasing Power Parities and exchange rates; Historical population data). **Notes:** Purchasing Power Parities for GDP (National currency per US dollar). Standard valuation based on SNA/ESA.

Figure 4:
Change in total culture spending per person,
2010 vs 2022, selected European countries
(real terms)



Source: Analysis of OECD data (Annual government expenditure by function (COFOG); Quarterly GDP and components - expenditure approach - volume and price indices (annual observation); Annual Purchasing Power Parities and exchange rates; Historical population data). **Notes:** Totals include categories 8.2 (cultural services) and 8.3 (broadcasting and publishing services). Constant Purchasing Power Parities for GDP (National currency per US dollar). Adjusted for inflation using OECD GDP deflator (rebased); Final consumption expenditure, General government; Index, 2015, calendar and seasonally adjusted.

The United Kingdom was one of a small minority of countries to reduce its total culture spending per person between 2010 and 2022. The 6% decrease in the UK contrasts with increases of 22% in Germany, 25% in France and 70% in Finland.

UK Government investment

DCMS grant-in-aid

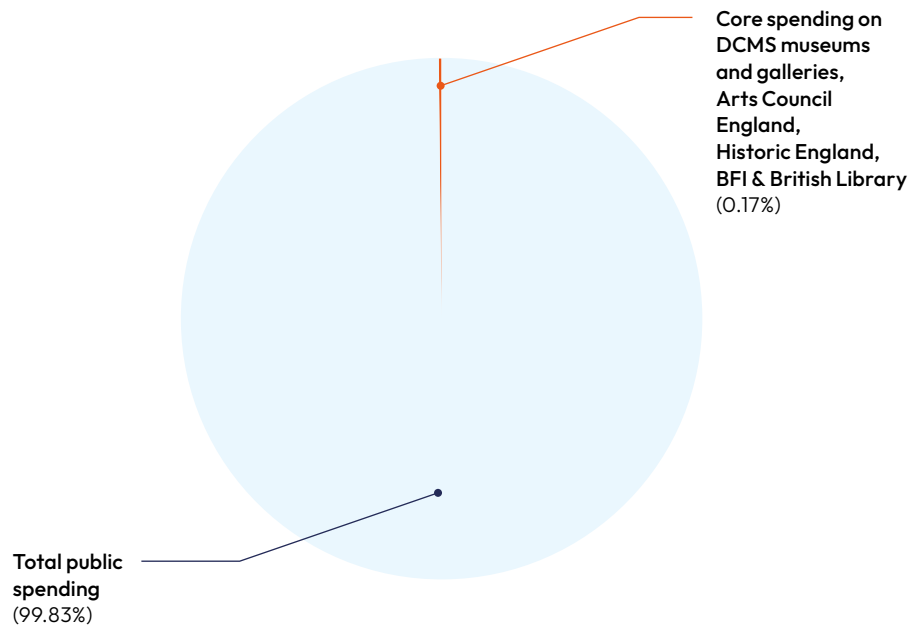
In the UK central government, the main public funder of the arts is the **Department for Culture, Media and Sport (DCMS)**⁵. It sponsors:

- 15 museums and galleries based in England;
- Arts Council England (ACE), which supports the arts, museums and libraries in England;
- Historic England, which supports the historic environment in England;
- the British Film Institute (BFI), which supports film in the UK;
- the British Library, the national library of the UK.

In 2022-23, this core sponsorship (or 'grant-in-aid') totalled **£21.93** per person, or **0.17%** of total public spending per person in the UK as a whole (£12,549).

Adjusted for inflation, this was **18% less than in 2009-10**.⁶

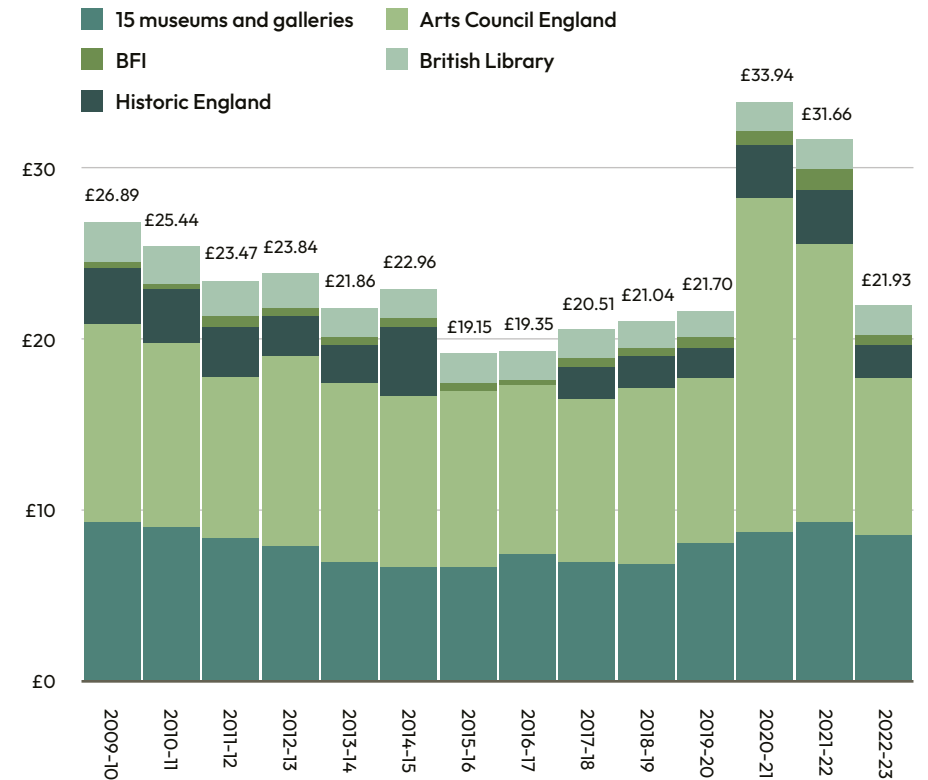
Figure 5:
Grant-in-Aid given to DCMS-funded cultural organisations per person as a proportion of total public spending per person in the UK 2022-23



Source: Analysis of Official Statistics (DCMS 'Total Income of DCMS-funded cultural organisations 2022-23'; HM Treasury 'Country and regional analysis 2022'); ONS mid-year population estimates (England and United Kingdom).

Notes: Per-person figures for the BFI and British Library are calculated using UK population estimates, since the legal extent of both bodies is the United Kingdom.

Figure 6:
Grant-in-Aid given to DCMS-funded cultural organisations per person, 2009-10 to 2022-23 (real terms, 2022-23 prices)



Source: Analysis of Official Statistics (DCMS 'Total Income of DCMS-funded cultural organisations 2022-23'); ONS mid-year population estimates (England); GDP deflator. **Notes:** Figures for Historic England before 2015-16 include English Heritage Trust; figures in 2015-16 and 2016-17 have been excluded as per the Official Statistic.

In recent years, an increasing amount of UK Government investment in the arts has come from other central departments, funds and initiatives.

Creative industries tax reliefs

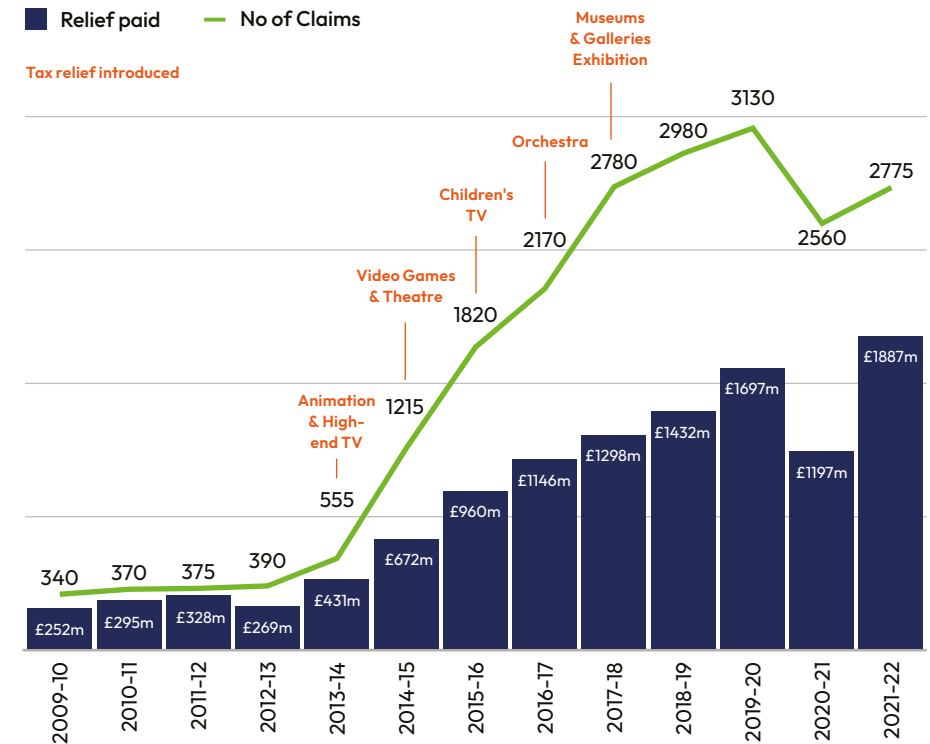
Between 2007 and 2017, the Government introduced eight ‘creative industry tax reliefs’ which apply across the UK. They are handled by a specialist unit within **HM Revenue & Customs**.

Eligible companies can pay less Corporation Tax when producing films, animation, high-end and children’s television, video games, theatre, exhibitions and orchestral concerts. This creates financial incentives to produce new work.⁷

In real terms between 2009-10 and 2021-22, the UK Government paid **£10.4 billion** in creative industries tax relief. As the number of reliefs increased from one to eight, the number of claims also increased significantly, from 340 to 2775.

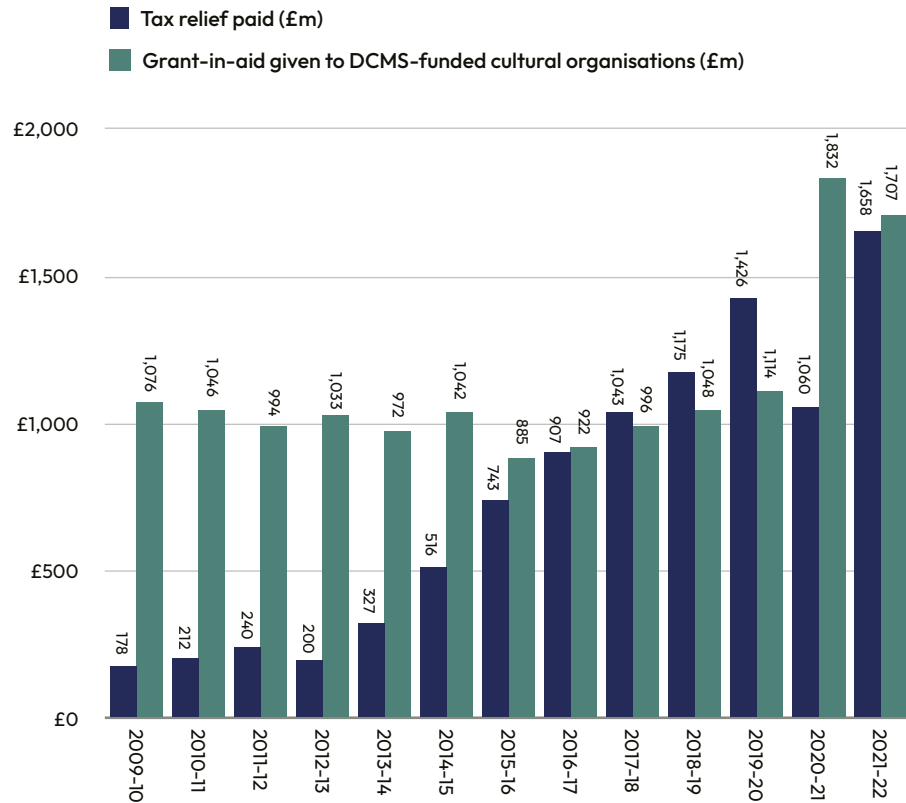
In 2021-22, the total paid across all creative industry tax reliefs was £1.9 billion. Adjusted for inflation, this was 649% more than in 2009-10.

Figure 7:
Total amount of creative industries tax relief paid (real terms, 2021-22 prices) and total number of claims, 2009-10 to 2021-22



Source: Analysis of Official Statistics (HMRC ‘Creative industries statistics: August 2023’); GDP deflator. **Notes:** Tax relief paid includes HETV, FTR, VGTR, TTR, CTR, ATR, OTR and MGETR. Tax relief paid is on accruals basis.

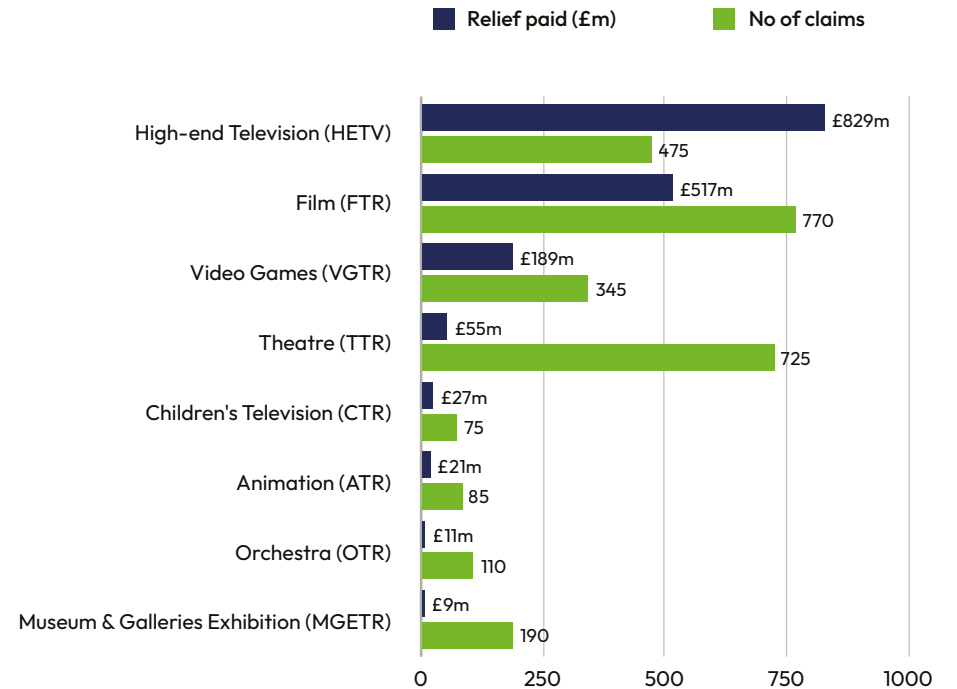
Figure 8:
Total amount of creative industries tax relief paid vs Grant-in-aid given to DCMS-funded cultural organisations, 2009-10 to 2021-22 (nominal terms)



Source: Analysis of Official Statistics (HMRC 'Creative industries statistics: August 2023', DCMS 'Total Income of DCMS-funded cultural organisations 2022-23'). **Notes:** Tax relief paid includes HETV, FTR, VGTR, TTR, CTR, ATR, OTR and MGETR, on accruals basis. Grant-in-aid given includes 15 museums and galleries, Arts Council England, Historic England, the BFI and the British Library.

In 2017-18, the UK Government's investment through the creative industries tax reliefs exceeded its grant-in-aid to DCMS cultural organisations for the first time. However, total grant-in-aid once again surpassed total tax relief in 2020-21, following the onset of the Covid-19 pandemic.

Figure 9:
Amount of tax relief paid (nominal terms) and number of claims, by individual relief, 2021-22



Source: Analysis of Official Statistics (HMRC 'Creative industries statistics: August 2023').
Notes: Accruals basis.

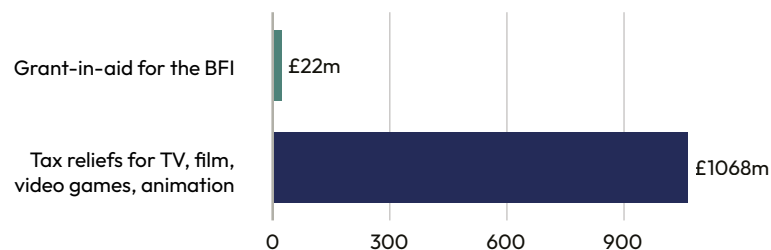
The scale and reach of relief varies significantly across different parts of the creative industries.

In the last published data (2021-22), over half (51%) of all creative industries tax relief was paid to high-end television, which made 17% of total claims. Conversely, only 3% of total tax relief was paid to theatre, but a larger number of productions benefitted (26% of total claims).

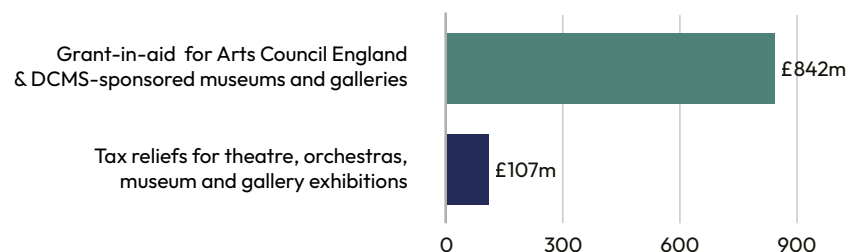
Whereas investment through the tax reliefs vastly exceeds the DCMS' grant-in-aid sponsorship of the moving image, for other arts the opposite is the case.

Figure 10:
Amount of tax relief paid (nominal terms) vs DCMS grant-in-aid, 2018-19

Moving image



Other arts



Source: Analysis of Official Statistics (DCMS 'Total Income of DCMS-funded cultural organisations 2022-23', HMRC 'Creative industries statistics: August 2023'). **Notes:** Tax relief paid is on accruals basis.

Due to the impacts of the Covid-19 pandemic on both productions and levels of grant-in-aid, this comparison uses data from 2018-19 (the latest financial year completely unaffected by the pandemic). In that year, investment in the moving image from tax reliefs was more than 48 times larger than grant-in-aid for the BFI. For other arts, grant-in-aid was almost 8 times larger than tax relief paid.

Other central funds

Levelling Up funding

Between 2020 and 2024, 'Levelling Up' funding was awarded to local projects by the UK Government, with the aim of reducing regional inequalities. The three most significant funds were:

- The **Levelling Up Fund** (*UK-wide*)
- The **UK Shared Prosperity Fund** – in place of EU structural funds after Brexit (*UK-wide*)
- The **Towns Fund** – consisting of Town Deals and the Future High Streets Fund (*England only*)⁸

'Cultural investment' was one of the three investment themes for the Levelling Up Fund⁹; 'engagement in local culture and community' was a stated aim of the UK Shared Prosperity Fund¹⁰; 'strengthening local economic assets including local cultural assets' was an objective of the Towns Fund.¹¹

The specific allocation for cultural projects within each central fund was not detailed, but we estimate that approximately £1.1 billion of the £4.8 billion Levelling Up Fund (23%) was allocated for cultural projects between 2021 and 2024. This figure has been reached by combining third-party data on Round 1 with Government publications on Rounds 2 and 3.¹²

Cultural Investment Fund

In 2019 the Department for Culture, Media and Sport (DCMS) announced it would invest £250m over five years in a **Cultural Investment Fund** (*England-only*) to "drive regeneration and growth"¹³. The CIF encompassed three capital funds – for cultural development, libraries improvement, and museum estate and development.

Culture Recovery Fund

The £1.6 billion **Culture Recovery Fund** (*England-only*) supported 5,067 organisations during the Covid-19 pandemic.

Evaluation of the fund found that it may have ensured the survival of 620-830 organisations and 6,700-20,500 jobs, delivering between £1.98 and £3.66 in benefits for every £1 of public spending.¹⁴

However, freelancers could not access the fund directly and some experienced considerable financial hardship, especially those who had limited recourse to other support schemes.

As a consequence of the UK Government creating the Culture Recovery Fund for England, Scotland received £97 million, Wales received £59 million and Northern Ireland received £33 million through the Barnett Formula.¹⁵ Each devolved government chose to establish its own support package for the cultural sector during the pandemic.

Investment Funds Programme

Investment Funds, sometimes referred to as gainshare or earn back, are long-term grants from the UK Government agreed as part of City Deals, Growth Deals and Devolution Deals. In 2018, Liverpool City Region became the first in the country to commit to spending the equivalent of 1% of its annual £30 million devolution funding to support cultural activities.¹⁶

Devolved governments

The Scottish Government, Welsh Government and Northern Ireland Executive give grant-in-aid to their own public bodies to support the arts and culture.

Some of these bodies are **national development agencies**, with responsibilities for funding, research, support, advice and partnership promotion.

Others are **national cultural organisations**, engaged directly in cultural activities.

There are differences in the ways these bodies are established and the exact responsibilities they have in each part of the UK; it is important to consider these differences when comparing their activities and funding.

Figure 11:
Key public bodies in UK arts and culture, July 2024

| | UK | England | Wales | Scotland | NI |
|-----------------------------------------|-----------------------------------|-----------------------------------------|---------------------------------------------|---------------------------------------------------------|--------------------------------------------------------|
| National development agencies | | | | | |
| Moving image | British Film Institute | - | Arts Council of Wales | Creative Scotland (including Screen Scotland) | NI Screen |
| Arts | - | Arts Council England | Welsh Government Culture Division | Museums Galleries Scotland | Arts Council of Northern Ireland |
| Museums and galleries | - | | Scottish Library and Information Council | Northern Ireland Museums Council | |
| Public libraries | - | | Historic Environment Scotland | Northern Ireland Library Authority (Libraries NI) | |
| Cultural and built heritage | National Heritage Memorial Fund | Historic England | RCAHM Wales & Welsh Government (Cadw) | Historic Environment Scotland | DfC Historic Environment Division |
| National cultural organisations | | | | | |
| National museums & galleries | 3 MoD-sponsored service museums** | 15 DCMS-sponsored museums and galleries | Amgueddfa Cymru - National Museums of Wales | National Museums Scotland & National Galleries Scotland | National Museums NI |
| National library | British Library | - | National Library of Wales | National Library of Scotland | - |
| National archives | National Archives * | | | National Records of Scotland * | Public Record Office of Northern Ireland (part of DfC) |
| National performing companies | - | - | - | National Performing Companies | - |
| National broadcaster | BBC (+ S4C in Wales) | | | | |

Notes: Grant-in-aid for public bodies operating in England is given by the UK Government. The BBC collects licence fee revenue from the public and transfers it to the Consolidated Fund (held by the Treasury); this revenue is then passed back to the BBC as grant-in-aid from the Department for Culture, Media and Sport.

* Non-ministerial government department

** Funding for the National Army Museum, the National Museum of the Royal Navy and the Royal Air Force Museum falls under the category of non-devolved spending.

The National Lottery

Since 1994, proceeds from the National Lottery have funded ‘good causes’ including the arts and heritage.

A proportion of revenue generated by the National Lottery is shared between:

- the UK Arts Councils (Arts Council England, Creative Scotland, Arts Council of Wales, Arts Council of Northern Ireland);
- the British Film Institute (BFI), which supports film in the UK;
- the National Lottery Heritage Fund, which supports heritage projects in the UK;
- the National Lottery Community Fund, which funds charitable and community projects in the UK, including in health, education and the environment;
- UK Sport, Sport England, Sport Scotland, Sport Wales and Sport Northern Ireland.

These bodies then award grants for projects.

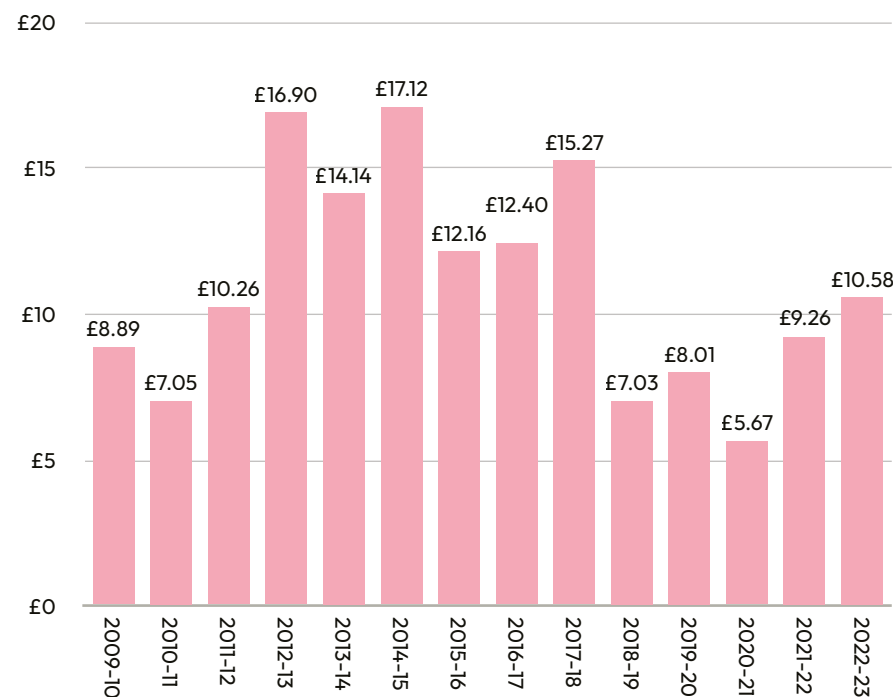
Since 2009-10, total recorded Lottery grant funding for arts and heritage projects has fluctuated. Adjusted for inflation, the mean average was **£11.05** per person in the UK.

However, the period between 2012-13 and 2017-18 saw a marked increase in recorded Lottery grant funding for arts and heritage projects. Over this six-year period, the mean average was £14.66 per person, compared with £8.73 over the three years prior and £8.11 over the five years following.

Recorded Lottery grant funding was at its lowest during the first phase of the Covid-19 pandemic in 2020-21.

In 2022-23, recorded Lottery grant funding for arts and heritage was 38% lower than the peak year (2014-15), and 4% lower than the average across the study period.

Figure 12:
National Lottery grant funding for arts and heritage, per person in the UK, 2009-10 to 2022-23 (real terms, 2022-23 prices)



Source: DCMS National Lottery grant database; ONS mid-year population estimates (UK).

Notes: Grants in ‘arts’ and ‘heritage’ categories have been combined. Includes grants for activity in progress or complete. Does not include grants made by the former Olympic Lottery Distributor.

The Arts Councils

Every part of the UK has an Arts Council; in Scotland, Wales and Northern Ireland, it is funded by each country's devolved government.

Arts Council England, Creative Scotland, the Arts Council of Wales and the Arts Council of Northern Ireland operate in their different, devolved contexts, but all exist to support and promote the arts and culture for everyone.

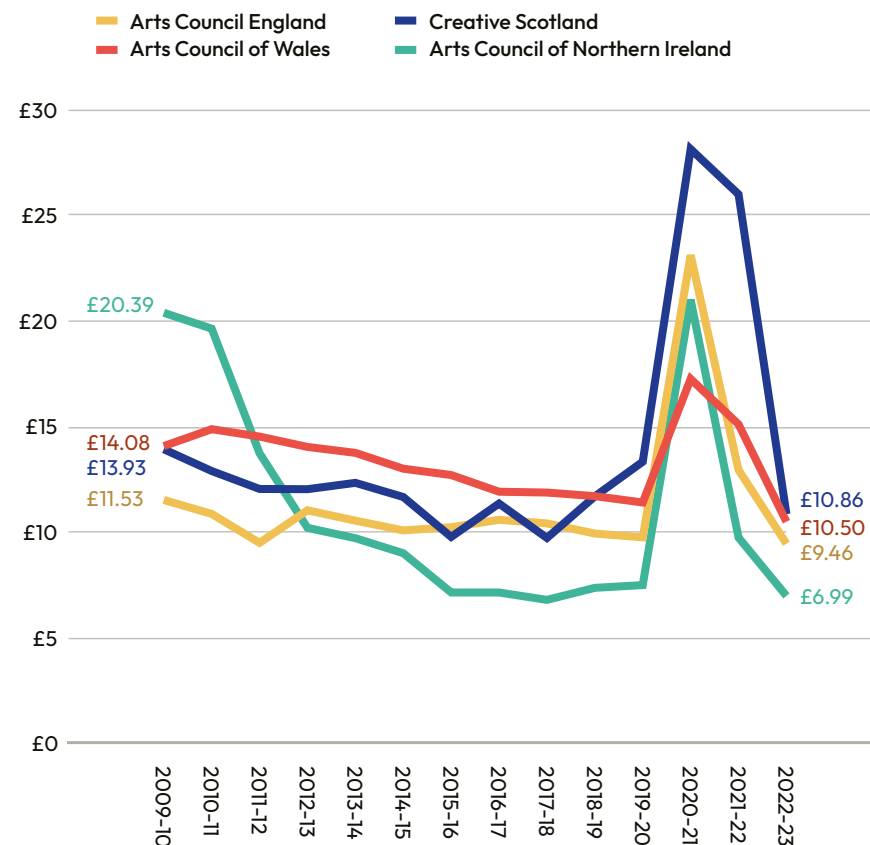
They determine the organisations and individuals in which to invest taxpayers' and lottery players' money, at 'arm's length' from the government. This important principle helps to guard against political interference or censorship by the government of the day, upholding free expression and enabling a more vibrant cultural landscape.

Between 2009-10 and 2022-23, in real terms, core grant-in-aid funding of the Arts Councils per person decreased by 18% in England, 22% in Scotland, 25% in Wales and 66% in Northern Ireland.

Grant-in-aid to the Arts Councils was at its highest during the first phase of the Covid-19 pandemic in 2020-21. Per person it increased by 136% in England, 111% in Scotland, 51% in Wales and 180% in Northern Ireland.

By 2022-23, in all four countries, grant-in-aid had decreased to levels below those seen before the pandemic in 2018-19.

Figure 13:
Grant-in-aid income to the UK Arts Councils per person, 2009-10 to 2022-23 (real terms, 2022-23 prices)



Source: Arts Council England / Creative Scotland / Arts Council of Wales / Arts Council of Northern Ireland annual reports and accounts (various years); ONS mid-year population estimates.

Notes: For Arts Council of Wales, Welsh Government Cultural Recovery Funding (CRF) has been added to grant-in-aid totals for consistency with accounting methods in England, Scotland and Northern Ireland.

From time to time, the Arts Councils review the cultural organisations to which they offer regular, core funding. In England these organisations are part of Arts Council England’s ‘National Portfolio’, which changes every 3-4 years.

In Arts Council England’s National Portfolio of 2022-23:

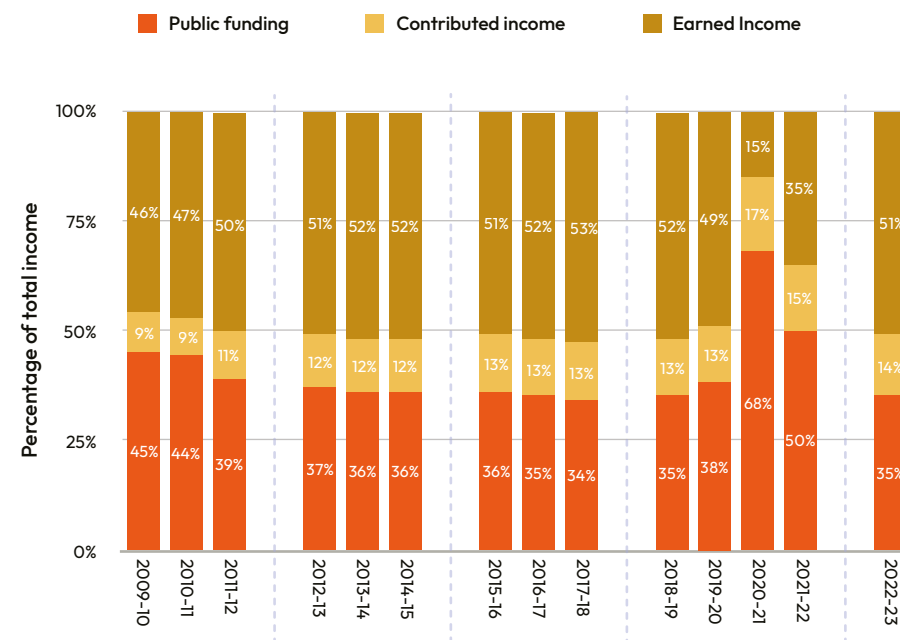
| Public funding provided | Contributed income provided | Earned income provided |
|------------------------------------------------|-----------------------------------------------|-----------------------------------------------|
| 35% of total income | 14% of total income | 51% of total income |
| ↓ 10 percentage points since 2009-10 Portfolio | ↑ 5 percentage points since 2009-10 Portfolio | ↑ 5 percentage points since 2009-10 Portfolio |

Across the study period, the biggest changes to public funding as a share of total income coincided with the biggest changes to Arts Council England’s grant-in-aid from the UK Government.

The biggest decrease was in 2011-12, when ACE grant-in-aid per person fell by 13%. In that same year, public funding fell by 5 percentage points as a share of total income in the National Portfolio.

The biggest increase was in 2020-21, when ACE grant-in-aid per person increased by 137%. In that same year, and in response to the Covid-19 pandemic, public funding grew by 30 percentage points as a share of total income in the National Portfolio. Nevertheless organisations’ total incomes went down; the median average was £690,517 in 2020-21, compared with £756,466 in the prior year – a 10% fall.

Figure 14:
Income mix of Arts Council England’s ‘National Portfolio’, 2009-10 to 2022-23



Source: Arts Council England annual survey data (various years). Additional data supplied by MyCake to produce a constant sample for 2018-19 to 2021-22. **Notes:** Dashed lines signify points at which organisations had to apply or re-apply for funding; at these points, the makeup of the National Portfolio changed. Analysis only includes organisations for which data was available in every year of a portfolio period: 2009-10 to 2011-12 (780 organisations); 2012-13 to 2014-15 (678 organisations); 2015-16 to 2017-18 (608 organisations); 2018-19 to 2021-22 (577 organisations); and 2022-23 (795 organisations). Public funding includes ‘Arts Council England subsidy’, ‘Local authority subsidy’ and ‘Other public subsidy’.

Despite a devastating collapse in earned income (-34 percentage points) and major Government support package in 2020-21 – both unprecedented in modern times – philanthropy and other contributed income grew by only 4 percentage points in that year.

Equivalent data is not currently available for Scotland, Wales and Northern Ireland.

The BBC

All parts of the UK are served by the BBC, the national public broadcaster.

The BBC occupies a central place in the cultural life of the UK – both by producing art and by connecting millions of people to the arts through TV, radio, podcasts, films, the internet and in-person events.

The BBC is the single largest employer of musicians and the main commissioner of new music in the UK. It platforms the widest range of music of any radio broadcaster, and produces the largest classical music festival in the world, the BBC Proms.¹⁷

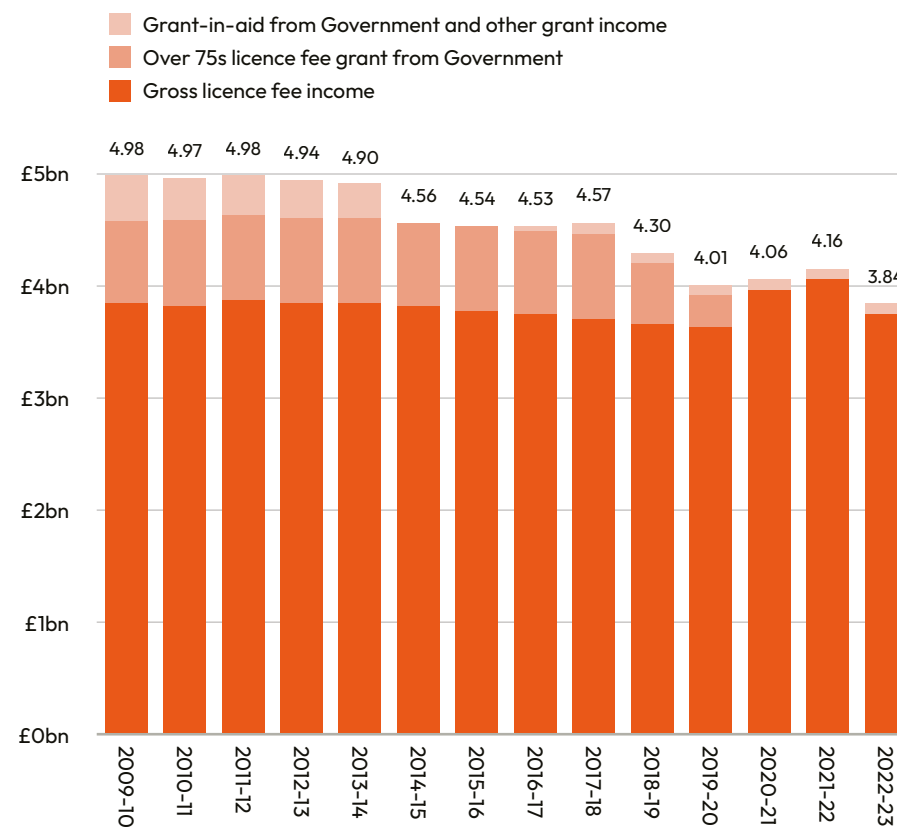
It offers graduate schemes, apprenticeships and talent development initiatives such as BBC Writers, BBC Young Musician and BBC Music Introducing, which has helped launch the careers of artists including Florence and the Machine, Ed Sheeran, Ellie Goulding and Little Simz.¹⁸

The BBC is principally funded through a licence fee paid by UK households; the amount is set by the UK Government in a periodic ‘licence fee settlement’.

Between 2009-10 and 2022-23, in real terms, the BBC’s public and grant funding decreased by 23%.

This was due to repeat freezes in the licence fee by the Government, the removal of Government grants to subsidise licences for the over 75s, and the reduction of Grant-in-aid from Government for the BBC World Service.

Figure 15:
Total public and grant funding of the BBC,
2009-10 to 2022-23 (real terms, 2022-23 prices)



Source: Analysis of BBC Group Annual Report and Accounts (various years); GDP deflator.

Notes: The BBC collects licence fee revenue from the public. Grant-in-aid from Government and other grant income includes funding for the BBC World Service and BBC Monitoring. Responsibility for funding of both was transferred to the licence fee in 2014. The Government transferred the financial responsibility of free licences for the over-75s from the Department for Work and Pensions to the BBC in 2019.

Local government

Local government is a major public funder of the arts and culture. Yet reductions in councils' spending power and increasing cost and demand pressures on statutory services (especially social care) have piled pressure on local cultural expenditure over recent years.¹⁹

Local authorities are primarily funded through a combination of:

- Central government grants (core and ring-fenced), from the UK Government in England and from the devolved administrations in Scotland, Wales and Northern Ireland;
- Local taxes (such as Council Tax/District Rates on residential properties and Business/Non-domestic Rates on commercial properties);
- Locally generated revenues (such as investments, property rental, service fees and charges).

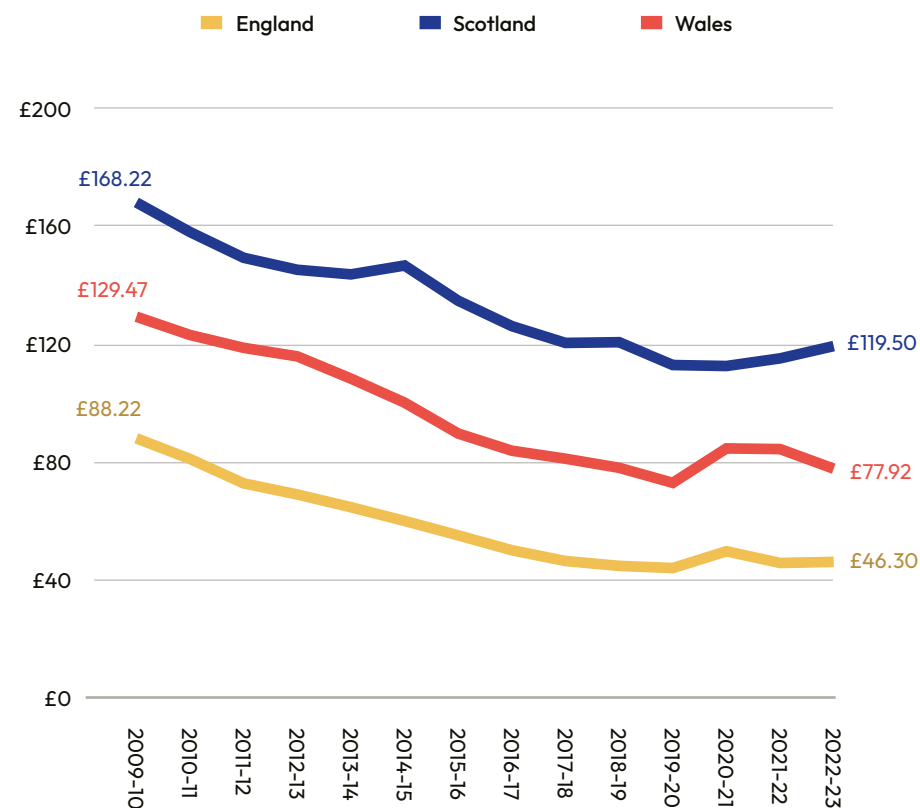
The specific mechanisms and structures vary in each part of the UK, and so does the way that local government spending data is coded and published.

It is possible to compare similar per-person revenue figures for a broad category that includes Culture, Heritage, Libraries, Parks and Leisure across the whole of the study period for England, Scotland and Wales. Unfortunately, comparable data is not available for Northern Ireland.

Between 2009-10 and 2022-23, in real terms, local authorities' revenue spending per person on culture and related services decreased by 29% in Scotland, 40% in Wales and 48% in England.

In 2009-10, Scottish local authorities were investing 91% more per person than in England; Welsh local authorities 47% more. In the last published data (2022-23), that gap had grown to 158% for Scotland and 68% for Wales.

Figure 16:
Local authority revenue spending on cultural and related services per person, 2009-10 to 2022-23 (real terms, 2022-23 prices)



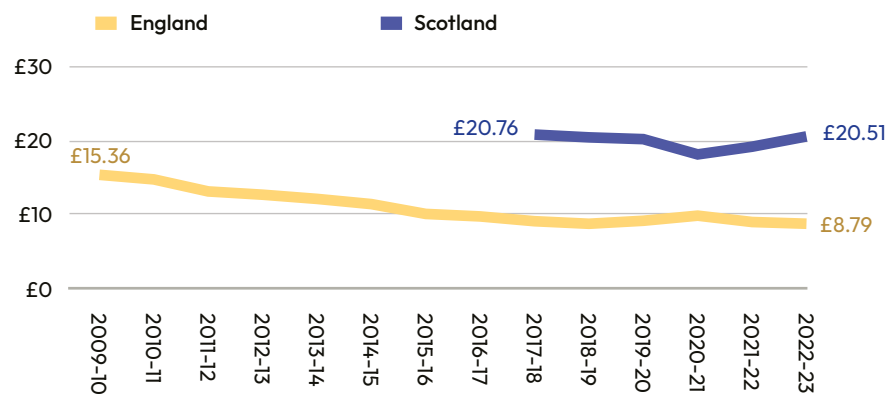
Source: Analysis of MHCLG Local authority revenue expenditure and financing (RO5), Scottish Local Government Finance Statistics, Welsh Government outturn expenditure summary (various years); ONS mid-year population estimates (England, Scotland, Wales, various years); GDP deflator. **Notes:** Net current expenditure.

Visit campaignforthearts.org/local and enter your postcode to see local government spend in your area, and how it's changed

England & Scotland – Culture & Heritage

From 2017-18, details of Scottish local authority revenue funding have been published with greater granularity. The category of ‘Culture and Heritage’ is now constituted similarly in England and Scotland, allowing for broad comparison.

Figure 17:
Local authority revenue spending on culture and heritage per person, 2009-10 to 2022-23 (real terms, 2022-23 prices)



Source: Analysis of MHCLG Local authority revenue expenditure and financing (RO5), Scottish Local Government Finance Statistics; ONS mid-year population estimates (England, Scotland, various years); GDP deflator. **Notes:** Net current expenditure.

Other than in 2020-21 (the start of the pandemic), **Scottish revenue investment per person has been more than double the investment by English local authorities.**

In both Scotland and England, real-terms investment per person was similar in 2017-18 to 2022-23.

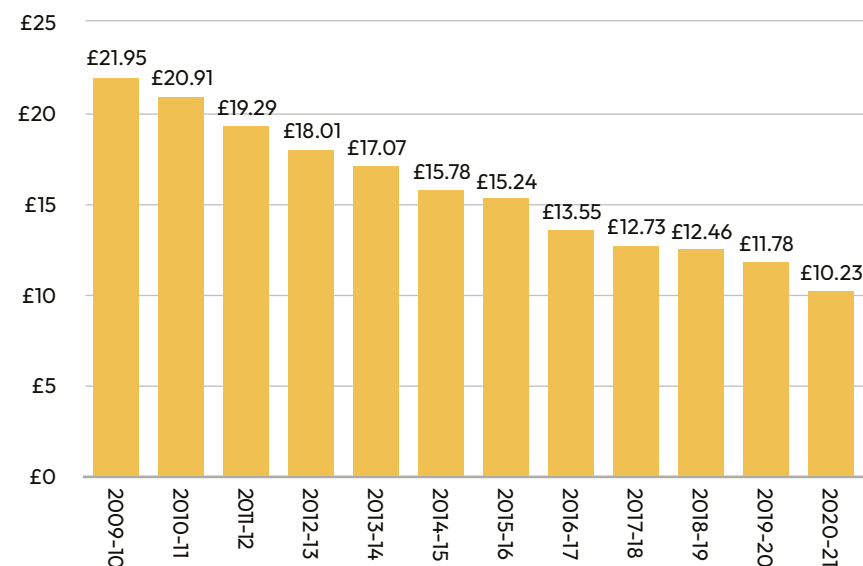
The data for England shows that the steepest falls in per-person revenue funding were in the period from 2011-12 to 2015-16. Over just five years, per-person revenue funding for Culture and Heritage fell by over 31%.

Public libraries

Local government is the primary funder of public libraries in the UK. In England and Wales, the Public Libraries and Museums Act 1964 requires local authorities to “provide a comprehensive and efficient library service”.

In Great Britain between 2009-10 and 2020-21, net expenditure on public libraries per person decreased by 53% in real terms.

Figure 18:
Net expenditure on British public libraries, per person, 2009-10 to 2020-21 (real terms, 2020-21 prices)



Source: CIPFA Public Library Statistics (various years); ONS mid-year population estimates (Great Britain); GDP deflator. **Notes:** Excluding capital charges. Dataset from after 2020-21 was not comparable. Equivalent data for Northern Ireland is not available.

Research in 2019 by the Chartered Institute of Public Finance and Accountancy (CIPFA) found 773 libraries had closed since 2010 – almost 1 in 5 – and reported “a sustained trend in which many services have been cut or redesigned, with councils’ ever-decreasing funds directed to priority areas such as social care”.²⁰

This trend has continued since then. Research for the Local Government Association has found that, in England, adult and children’s social care comprised 66% of councils’ service spending in 2023-4, up from 55.4% in 2010-11. Culture and leisure comprised 4.5% of council’s service spending in 2023-4, down from 7.4% in 2010-11.²¹



"To me art and creativity is the best way of expressing myself as an individual. I use art to communicate my views ideologies and culture through my own personal interest in graphic design. The arts support me to develop my critical thinking, creating unique ideas that help me to use my voice. I believe that a world without art will cause society to lose individuality and expression."

– Theo

Photograph by Ayesha Jones

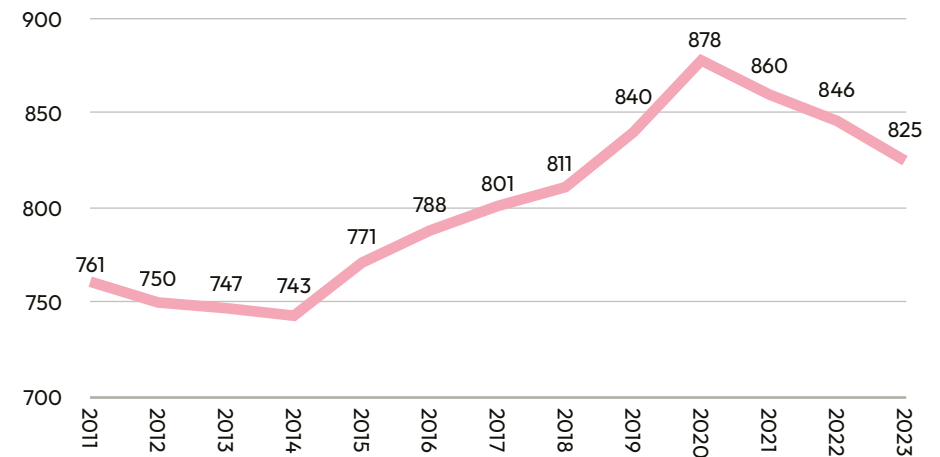
Arts Provision

A society in which the arts are healthy is one in which there is an extensive and diverse cultural offering: places to go and things to do.

People are more likely to experience and benefit from the arts if there are local, affordable events and venues. Monitoring provision is therefore crucial, but the data required to do so is often scattered and inaccessible.

There are some notable exceptions for venues data. Between 2016 and 2020 the Mapping Museums project catalogued over 4,000 museums active in the UK since 1960.²² Since 2019 the Greater London Authority (GLA) has maintained a 'Cultural Infrastructure Map' for London, plotting cultural spaces alongside contextual information (e.g. transport networks, population growth).²³

Figure 19:
Number of cinema sites in the UK, 2011 to 2023



Source: UK Cinema Association, OMDIA, CAA

Some membership associations and sector support organisations collect and publish data on cultural infrastructure. From an analysis of data released by the UK Cinema Association, we can see that the number of cinemas in the UK increased by 18% between 2014 and 2020, but has since declined by 2% each year.

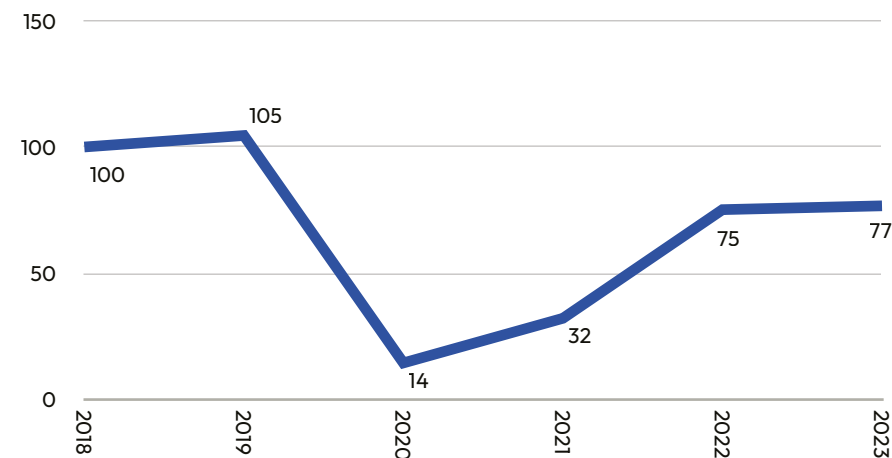
Yet for other parts of the cultural sector, and at scale across the whole UK, provision is hard to evaluate – especially when it comes to an assessment of the events being offered within (and beyond) venues nationwide.

In this section we have analysed the UK's largest set of live events data, maintained by Data Thistle, to better understand the scale and affordability of the cultural sector's offering to the UK public since 2018. By tracking changes in the number and average price of events, we can see how the pandemic didn't only affect organisations' income, but also their output.

The data sample we have analysed is not comprehensive. We have had to exclude some significant areas of cultural provision, such as film screenings and exhibitions, due to the way that information about these events is published. For example, a single exhibition with 15-minute entry slots may be listed as thousands of separate 'events' over a year-long display period. To avoid distorting the overall count, we have had to focus on live artforms for which each instance is likely to represent a distinct performance.

The sample still includes almost 1 million events that occurred between 2018 and 2023, spanning music, theatre, dance and comedy, across the whole United Kingdom. Data Thistle collects live events data directly from the source for a higher level of accuracy.

Figure 20:
Number of music, theatre, dance and comedy events in the UK, 2018 to 2023 (indexed, 2018 = 100)



Source: Data Thistle. **Notes:** Calendar years. Excluding online-only events.

The number of listed events grew in the year prior to the pandemic, before falling sharply in 2020 to only 14% of the number in 2018. By the end of the study period in 2023, the number of events had recovered only partially to 77% of the 2018 baseline. This is 28 percentage points below the pre-pandemic level in 2019, and only 2 percentage points above the number in 2022, suggesting **recovery is incomplete and yet slowing.**

The pre-pandemic growth and post-pandemic recovery of event numbers varied depending on the scale of events. Venue size is identifiable for 48% of the total sample (479k events). We have conducted separate analyses for

| | | |
|---------------------------|--------------------------------|-------------------|
| Small venues | Capacity fewer than 400 people | 49% of all events |
| Medium venues | Capacity 401 to 1000 people | 28% of all events |
| Large venues | Capacity 1001 to 2,500 people | 18% of all events |
| Extra Large venues | Capacity 2,500+ people | 5% of all events |

Across venues of all sizes, there were fewer events listed in 2023 than in 2018.

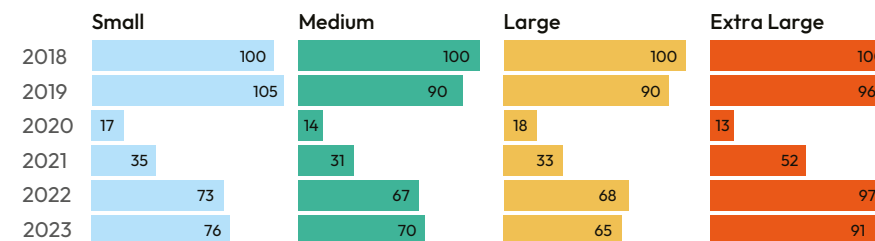
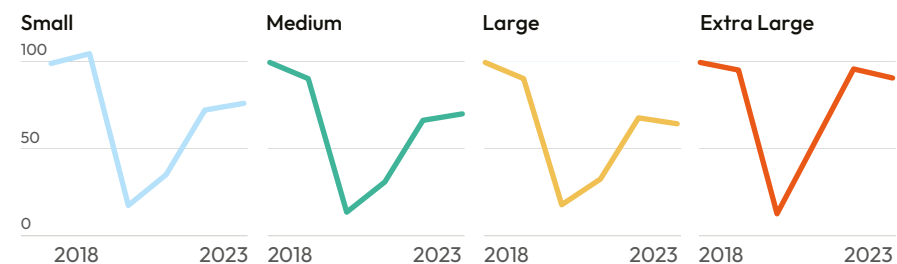
This is despite a continued move towards online ticketing and more free/very low-cost ticketing providers operating across the period. **It suggests that a significant number of venues, producers and promoters have scaled back their operations or shut down.**

Between 2018 and 2019, growth in event numbers was driven entirely by small venues, where around half of all events occurred. Yet by 2023, the number of listed events in these venues was only 76% of the number in 2018. Medium and large venues were offering even fewer events relative to 2018 (70% and 65% respectively).

Extra-large venues saw the biggest drop in event numbers in 2020 but made the strongest post-pandemic recovery. Still, the number of events fell in extra-large and large venues between 2022 and 2023, by 6 and 3 percentage points respectively. This suggests that a 'boom' in event production at such venues immediately following the easing of lockdown restrictions has since slowed.

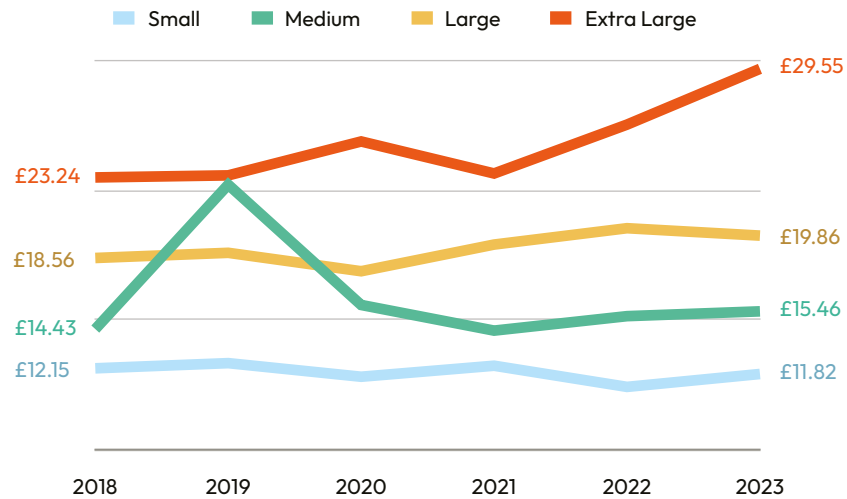
Extra-large venues were able to 'bounce back' in 2022 and 2023 while also increasing their ticket prices.

Figure 21:
Number of music, theatre, dance and comedy events in the UK, 2018 to 2023, by size of venue (indexed, 2018 = 100)



Source: Data Thistle. Notes: Calendar years. Excluding online-only events.

Figure 22:
Average ticket prices of music, theatre, dance and comedy events in the UK, 2018 to 2023, by size of venue (nominal terms)



Source: Data Thistle. Notes: Calendar years. Excluding online-only events.

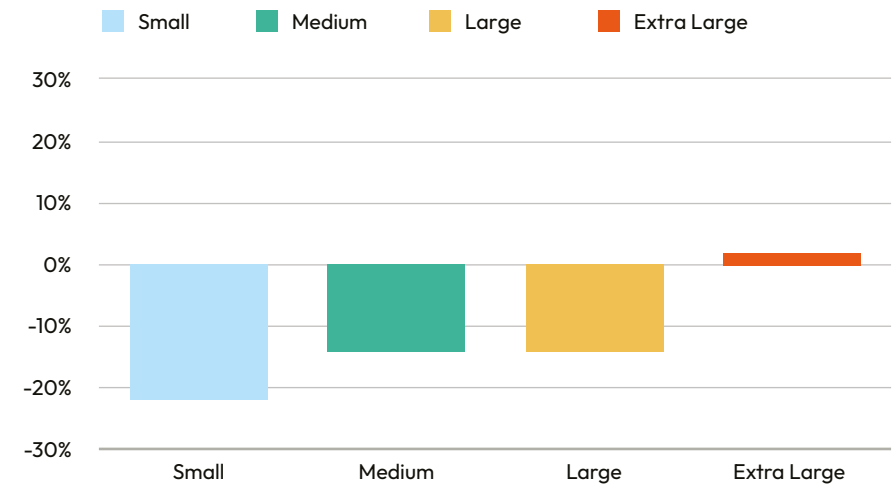
By 2023, the average ticket price for an event in an extra-large venue was 27% higher than in 2018.

Medium and large venues were offering events at average prices only 7% higher, while also hosting 65-70% of the events they hosted in 2018.

In small venues the average ticket price actually went down, by 3% over the period. This is despite a concurrent 24% fall in the number of events.

Over this period, inflation averaged 4.5% a year according to the Consumer Price Index (CPI). Only in extra-large venues did average ticket prices keep pace with inflation. In medium and large venues, average ticket prices in 2023 were 14% lower than in 2018 when adjusted for inflation. In small venues, they were 22% lower.

Figure 23:
Average ticket prices of music, theatre, dance and comedy events in the UK, 2018 vs 2023 (real terms, 2023 prices), by size of venue



Source: Data Thistle, ONS Consumer Price Index. Notes: Calendar years. Excluding online-only events.

| | Average ticket price | | | |
|--------------------|----------------------|--------------------------------|----------------------|-------------------------------|
| | 2018 (nominal terms) | 2018 (real terms, 2023 prices) | 2023 (nominal terms) | 2023 (nominal) vs 2018 (real) |
| Small | £12.15 | £15.16 | £11.82 | -22% |
| Medium | £14.43 | £18.01 | £15.46 | -14% |
| Large | £18.56 | £23.16 | £19.86 | -14% |
| Extra Large | £23.24 | £29.00 | £29.55 | +2% |

Impacts of economic trends

In the previous section we noted that levels of public funding have declined in real terms over recent years - whether from the DCMS, the devolved governments, the Arts Councils or local councils. As a result, many cultural organisations have become more reliant on earned and contributed income for their core funding. This applies to producing companies as well as to venues.

This trend may have affected the number of events being produced over the period - in some cases leading to more events for revenue generation, in other cases fewer events to reduce exposure to commercial risk. It may also have affected the *type* of events being produced, and thus the diversity of the cultural offering.

Many local authorities own buildings that are used for cultural purposes, and/or leased to cultural organisations at 'peppercorn' rents. The risk of a "fire sale" of public assets due to councils' multibillion-pound funding shortfall²⁴ is therefore a serious risk to cultural provision. A 2023 study of government data and freedom of information requests found that an estimated 75,000 public assets - such as playing fields, community centres, libraries, youth clubs and swimming pools - had been sold by English councils since 2010, in part to plug holes in their budgets²⁵. Unlike revenue budgets, which can be replenished year-to-year, public and cultural buildings cannot easily be recovered once they have been sold to a private buyer.

Pan-economy factors such as increased energy and rent prices, rising supply costs and changes in audience behaviour / footfall have all increased pressures on arts provision in recent years. According to the Music Venue Trust, 76 grassroots music venues closed in 2023, with 42% of them citing financial issues.²⁶



"Being involved in a creative arts project has significantly changed my perspectives on the world, others and myself. I believe that arts and cultural experiences can improve the lives of young people and help them figure out what they want to do in life with positivity. There is always a safe space with the arts."

– Ava

Photograph by Ayesha Jones

Arts Engagement

A society in which the arts are healthy is one in which people from all communities and backgrounds are engaging with what's on offer and participating in the arts.

Engaging with the arts improves quality of life and supports our health and wellbeing.²⁷

Tens of millions of people engage with the arts in the UK every year. We know this from official surveys that are conducted regularly in each of the four nations.

Fieldwork for all of these surveys is conducted continuously. Releases are published annually, except in England where they are published quarterly.

Results can be used to monitor arts and cultural **attendance** and **participation** in the adult (16+) populations of each UK nation.²⁸

While it is not always easy or meaningful to distinguish between 'attendance' and 'participation', the former generally pertains to engagement with **events** or **sites**, such as pantomimes at theatres; the latter to doing **activities**, such as painting or drawing.

Crucially however, the surveys use different criteria and ask different questions in different ways. There is not currently a harmonised survey covering all four UK nations. For this reason, we have had to consider arts engagement in each nation separately.

It should be noted that throughout this section, non-engagement does not necessarily imply a lack of public interest; it may instead reflect limited or inaccessible provision.

Figure 24:
National-level surveys for monitoring arts engagement in the UK

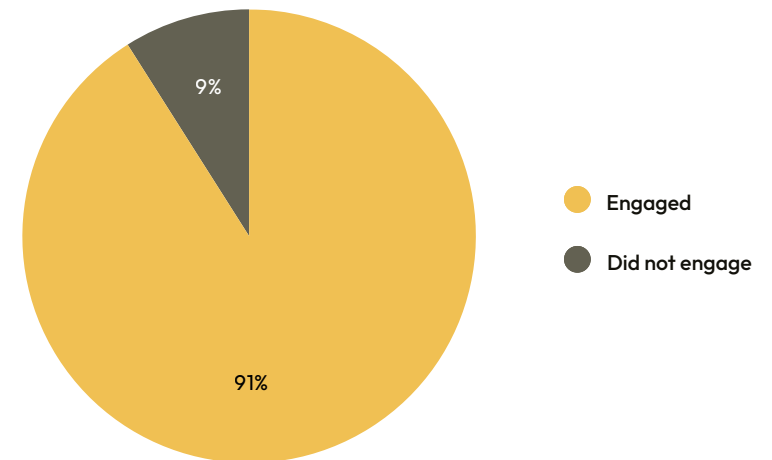
| | England | Scotland | Wales | Northern Ireland |
|----------------------------------------------|---------------------------------------------------------------|------------------------------------------------------------------------|---------------------------------------------------|-----------------------------------------------------------------------------------------------|
| | Participation Survey ²⁹ | Scottish Household Survey (SHS) ³⁰ | National Survey for Wales ³¹ | Continuous Household Survey (CHS) ³² |
| Conducted by | UK Government, Department for Culture, Media and Sport (DCMS) | Scottish Government | Welsh Government | Northern Ireland Statistics and Research Agency (NISRA), part of the Department of Finance |
| Target population | Adults aged 16+ in England | Households in Scotland | Adults aged 16+ in Wales | Households in Northern Ireland |
| Standard annual sample size (approx.) | 33,000 people | 10,000 people | 12,000 people | 9,000 people |
| Data collection method | Push to web | Face-to-face interviews (telephone/video during 2021 and some of 2020) | Telephone interviews (face-to-face prior to 2020) | Face-to-face and telephone interviews (face-to-face only before 2020, telephone only 2020-22) |

England

Fieldwork for the most recent survey release was conducted between October and December 2023.

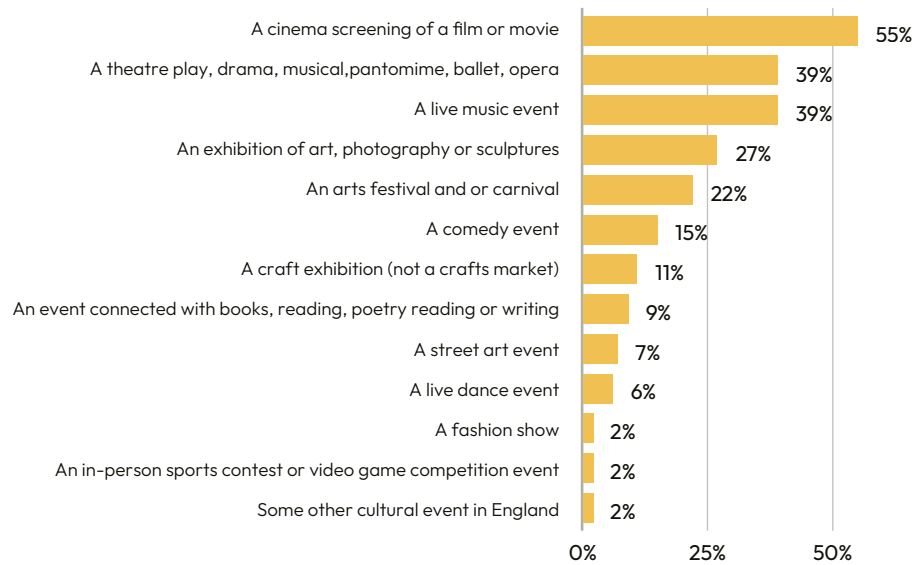
91% of adults reported that they had ‘engaged with the arts in person’ in the prior 12 months. A clear majority (59%) said they did so at least once a week.

Figure 25:
Proportion of adults (16+) in England who had engaged with the arts in person in the prior 12 months, Q4 2023



Source: Analysis of Official Statistics (DCMS ‘Participation Survey October to December 2023 publication’).

Figure 26:
Proportion of adults (16+) in England who had attended arts events in the prior 12 months, Q4 2023

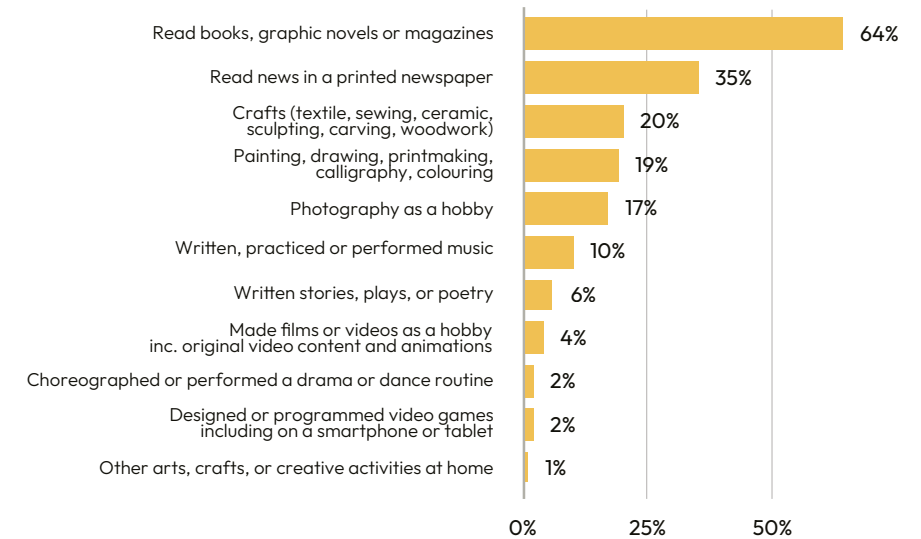


Source: Analysis of Official Statistics (DCMS 'Participation Survey October to December 2023 publication').

77% had 'attended an arts event' in the prior 12 months. Of the options surveyed, the highest reported type of attendance was a trip to the cinema (55%), followed by live theatre/ballet/opera and live music (39%).

In-person museum and library attendance was reported elsewhere in the survey, and was 44% and 25% respectively.

Figure 27:
Proportion of adults (16+) in England who had participated in arts activities in the prior 12 months, Q4 2023



Source: Analysis of Official Statistics (DCMS 'Participation Survey October to December 2023 publication').

79% had 'participated in an arts activity' in the prior 12 months. Of the options surveyed, the highest reported type of participation was reading. 1 in 5 participated in crafts, and 19% in visual arts activities including painting and drawing.

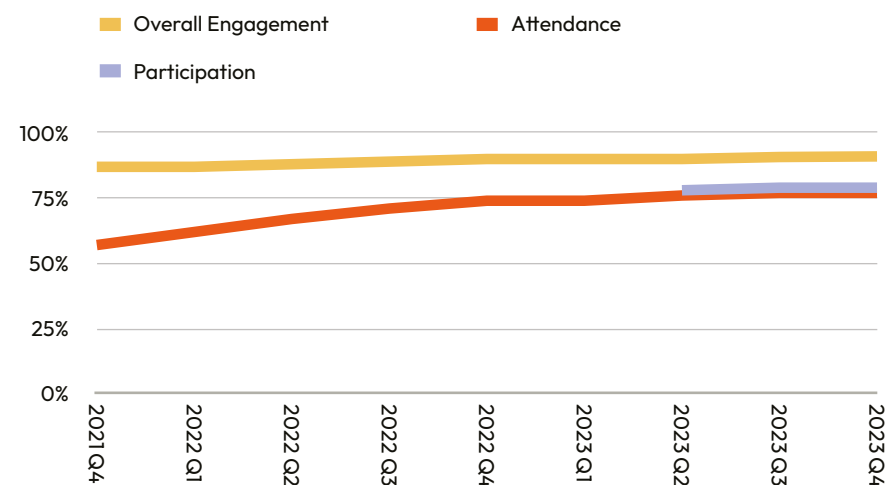
It is noted that around 83% of the UK population uses social media³³. Capturing photos and videos for social media is not explicitly recognised as arts participation in any of the UK surveys; in Northern Ireland 'family or holiday snaps/videos' are explicitly excluded from the category of 'taking photographs or making films or videos as an artistic activity'.

Before the Participation Survey was introduced in 2021-22, the 'Taking Part Survey' was used to monitor arts engagement in England. It asked different questions and collected data differently; for example, cinema screenings were not recognised in arts attendance and reading was not recognised as arts participation. For this reason, results from the two surveys are not strictly comparable.

Between 2009-10 to 2019-20, overall engagement levels in the arts (as defined by the Taking Part survey) ranged from 76% to 79% of the adult population. There was no statistically significant trend up or down across the 11 years.

Among disabled people it rose from 70% to 76% – a statistically significant increase.³⁴ Engagement reported by people who self-identified as 'Black and Minority Ethnic' ranged from 65% to 71%; there was no significant trend up or down across the 11 years.

Figure 28:
Proportion of adults (16+) in England who had engaged with the arts in the prior 12 months, October 2021 to December 2023

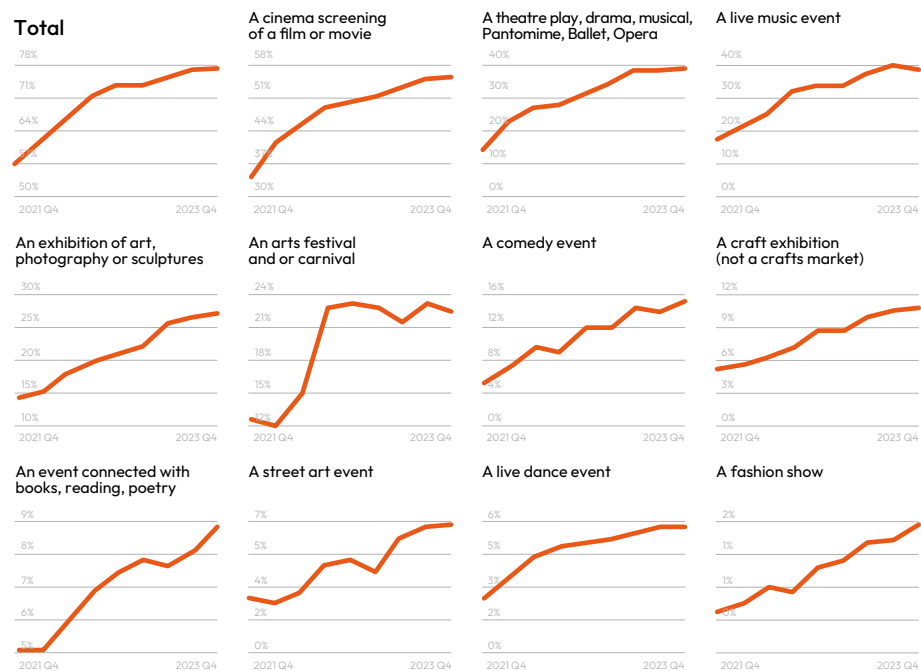


Source: Analysis of Official Statistics (DCMS 'Participation Survey', quarterly releases). Notes: Data to show a breakdown between Attendance and Participation is not available before 2023 Q2.

Total participation has only been reported since Q2 of 2023, and has been stable at 78-79%.

Total attendance has increased significantly from 57% in Q4 of 2021 to 77% in Q4 of 2023. A significant part of the explanation is likely to be the impacts of the Covid-19 pandemic on attendances reported during the survey period. Pandemic restrictions in England were not lifted until 2022 Q1.

Figure 29:
Proportion of adults (16+) in England who had attended arts events in the prior 12 months, October 2021 to December 2023, by type of attendance



Due to the quarterly releases of survey results in England, we can see how each type of attendance has changed with greater granularity.

For all types there has been growth since October 2020 (the earliest point at which attendances reported in the 2021 Q4 survey may have occurred). Attendance at cinemas recovered especially quickly, and has continued to grow albeit at a slower rate.

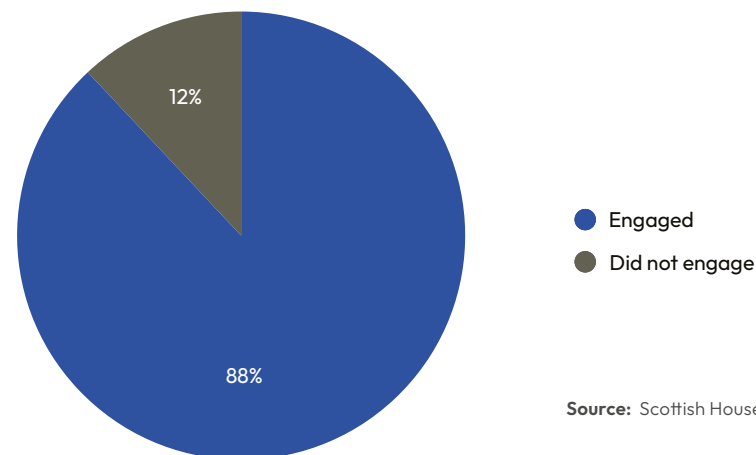
In the most recent survey results, covering 2023 Q4 and the 12 months prior, there are reported drops in attendance at live music events (-1.2 percentage points), festivals (-0.7 percentage points) and exhibitions (-0.2 percentage points), and increases at theatre/ballet/opera (+0.7 percentage points), literary events (+0.8 percentage points) and comedy events (+1.3 percentage points), compared with 2023 Q3 and the 12 months prior.

Scotland

Fieldwork for the most recent Scottish Household Survey was conducted between March 2021 and March 2022.

88% of adults reported that they had been ‘culturally engaged’ – attending at least one cultural event or place, or participating in a cultural activity – in the prior 12 months.

Figure 30:
Proportion of adults (16+) in Scotland who were culturally engaged in the prior 12 months, 2021-22

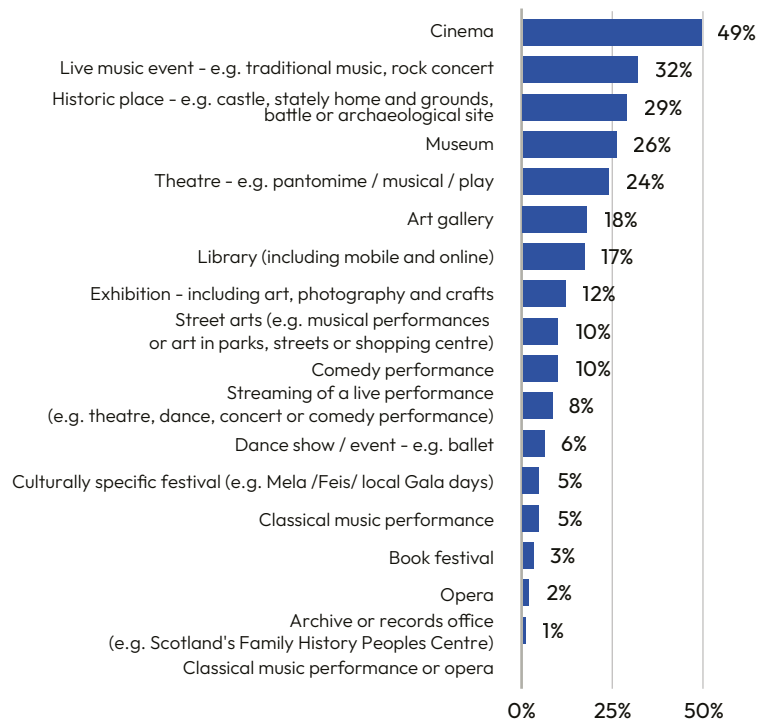


Source: Scottish Household Survey 2022.

74% had attended a ‘cultural event’ or ‘visiting place of culture’ (including museums and libraries). This was a 7 percentage point decrease on 2018 (81%) and 2019 (81%). A significant part of the explanation for this is likely to be the impacts of the Covid-19 pandemic on attendances reported during the survey period.³⁵

Of the options surveyed, the highest reported type of attendance was a trip to the cinema (49%), followed by a live music event. These were also the highest reported types of attendance in England (though theatre was joint-second-highest in England).

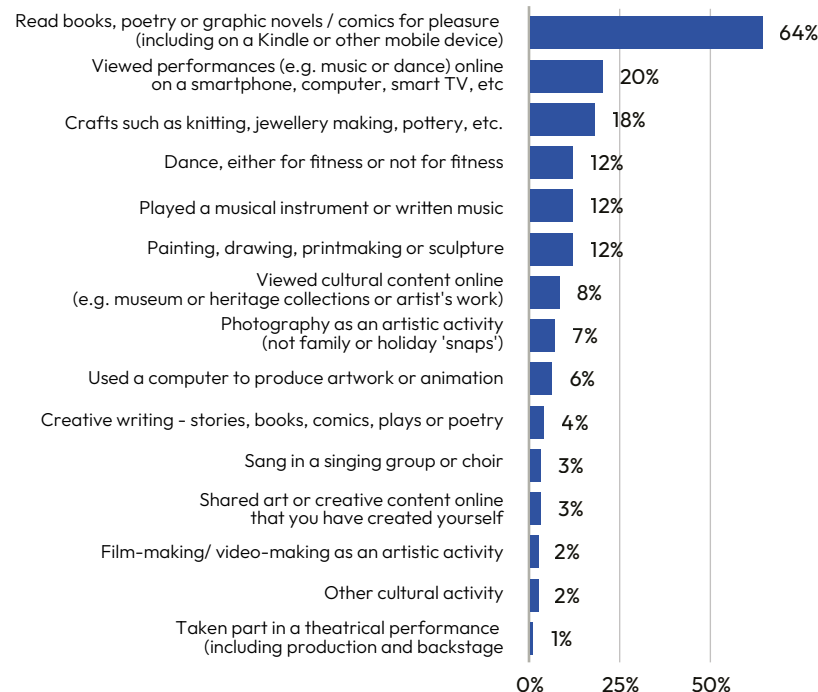
Figure 31:
Proportion of adults (16+) in Scotland who had attended cultural events or visiting places of culture in the prior 12 months, 2021-22



Source: Scottish Household Survey 2022.

76% reported that they had ‘participated in an arts activity’ in the prior 12 months (Figure 32). Of the options surveyed, the highest reported type of participation was reading (64%), followed by ‘viewing performances (e.g. music or dance) online’ (20%), which the Scottish Household Survey defines as cultural participation rather than digital attendance.

Figure 32:
Proportion of adults (16+) in Scotland who participated in an arts activity in the prior 12 months, 2021-22



Source: Scottish Household Survey 2022.

The Scottish Household Survey reports attendance including and excluding cinema, and participation including and excluding reading.

Including cinema, attendance in Scotland is almost identical for self-identifying ‘minority ethnic groups’ as for the adult population as a whole. This is not reflected in the disabled population, in which attendance is 18 percentage points lower than the population as a whole.

Including reading, levels of participation are very similar for disabled people, ‘minority ethnic groups’ and the adult population as a whole. Excluding reading, participation by ‘minority ethnic groups’ is five percentage points higher than the population as a whole.

Wales

Fieldwork for the most recent National Survey for Wales was conducted between April 2022 and March 2023.

Unlike in England and Scotland, the survey does not report a figure for overall engagement encompassing attendance and participation. However it does report on each of these separately.

64% of people reported that they had 'attended an arts event in the last 12 months'

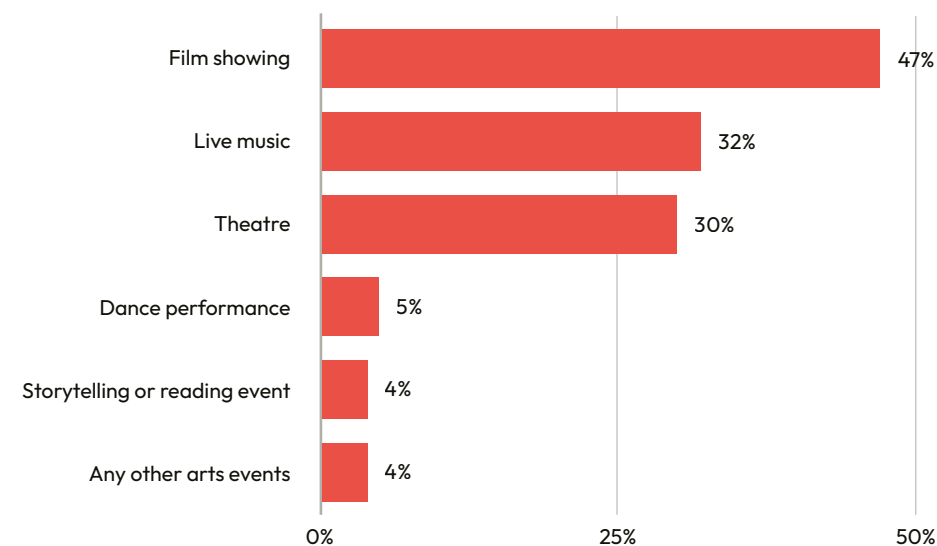
This was a 6 percentage point decrease on 2019-20 (70%) and a 4 percentage point decrease on 2017-18 (68%). A significant part of the explanation for this is likely to be the impacts of the Covid-19 pandemic on attendances reported during the survey period.

Analysis using the Welsh Index of Multiple Deprivation reveals significant disparities in arts attendance. Among the least deprived fifth of the population, 70% had attended an arts event in the last 12 months, but among the most deprived fifth of the population, only 58% had done so.

There was a 17 percentage-point gap in attendance between those who reported a limiting long-standing illness, disability or infirmity (54%) compared with those who did not (71%).

In-person museum and library attendance was reported elsewhere in the survey, and across the population as a whole was 31% and 25% respectively.

Figure 33:
Proportion of adults (16+) in Wales who had attended an arts event in the prior 12 months, 2022-23

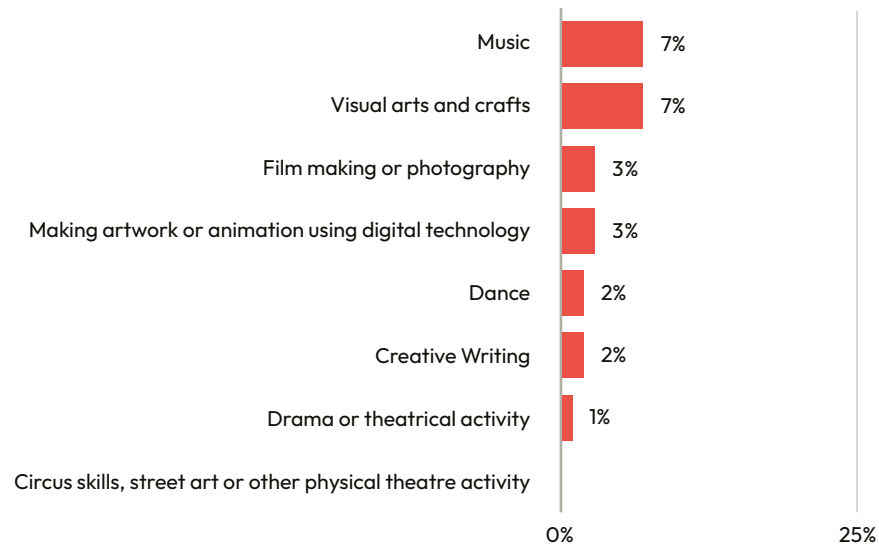


Source: National Survey for Wales 2022-3.

Of the options surveyed, the highest reported type of attendance was 'film showing' (47%). 'Live music' (32%) was closely followed by 'theatre' (30%).

Only 18% reported that they had 'participated in any arts events in the last 12 months'. Of the options surveyed, the highest reported types of participation were music (7%) and visual arts and crafts (7%).

Figure 34:
Proportion of adults (16+) in Wales who participated in arts activities in the prior 12 months, 2022-23



Source: National Survey for Wales 2022-3.

Among those self-identifying as ‘Black, Asian or Minority Ethnic’ people, levels of arts participation were average (18%), but levels of arts attendance were 8 percentage points lower.

Overall attendance and participation figures are significantly lower in Wales than those reported in surveys from England and Scotland. This may be because of the differences in prompts and methodology (in particular, the exclusion of reading as a form of arts participation). In the absence of harmonised statistics between the nations, we cannot say whether and to what extent actual engagement is lower.

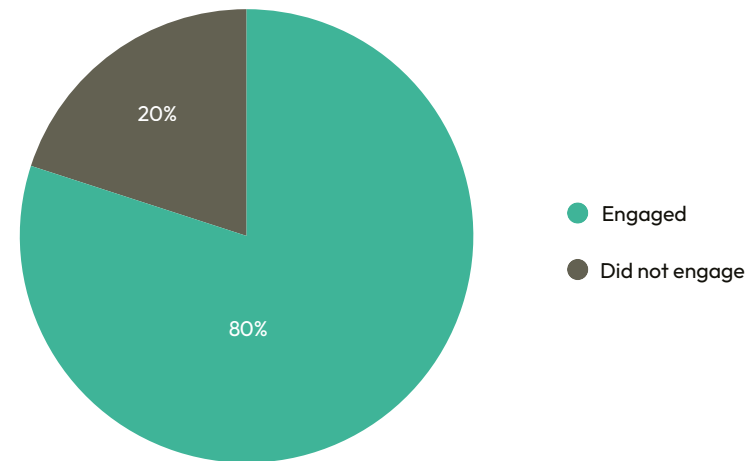
Due to frequent changes to question wording in Wales (for example, the exclusion of art exhibitions in recent wording), it is also challenging to detect or evidence changes in actual engagement between years, including in the post-pandemic period.

Northern Ireland

Fieldwork for the most recent Continuous Household Survey was conducted between April 2022 and March 2023 (the same period as the latest National Survey for Wales).

80% of adults reported that they had ‘engaged in culture and arts’ in the prior 12 months (including public libraries, museums and the Public Record Office of Northern Ireland).

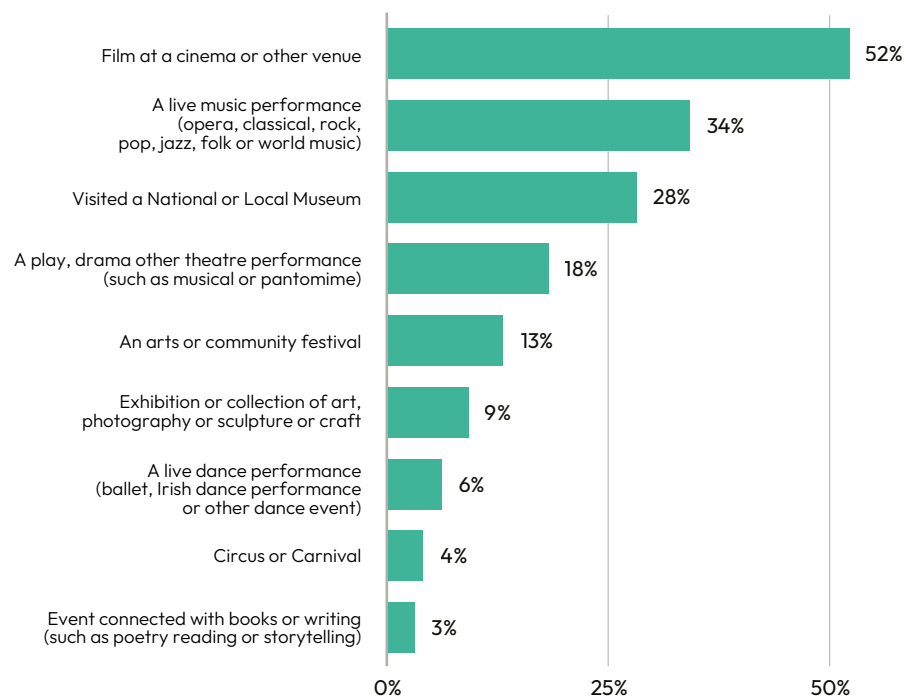
Figure 35:
Proportion of adults (16+) in Northern Ireland who had engaged in culture and the arts in the prior 12 months, 2022-23



Source: Northern Ireland Continuous Household Survey 2022-3.

71% reported ‘attendance at arts events’ in the prior 12 months (including visits to museums). Of the options surveyed, the highest reported type of attendance was to watch a film at a cinema or other venue (52%), followed by live music performance (34%).

Figure 36:
Proportion of adults (16+) in Northern Ireland who attended an arts event in the prior 12 months, 2022-23

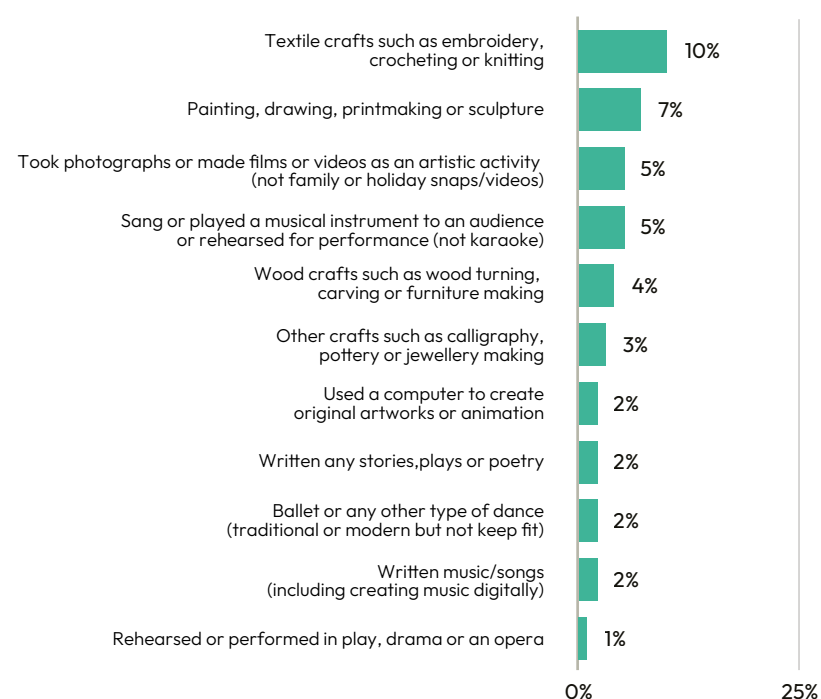


Source: Northern Ireland Continuous Household Survey 2022-3.

In-person attendance at public libraries was reported elsewhere in the survey and was 22%. There was a 17 percentage-point gap in attendance between those ‘living in least deprived areas’ (82%) and ‘living in most deprived areas’ (65%), and a 20 percentage-point gap between those who reported a disability (57%) and those who did not (77%).

28% reported that they had ‘participated in an arts activity’ in the prior 12 months (Figure 37). Of the options surveyed, the highest reported type of participation was textile crafts (10%), followed by ‘painting, drawing, printmaking or sculpture’ (7%).

Figure 37:
Proportion of adults (16+) in Northern Ireland who participated in arts activities in the prior 12 months, 2022-23



Source: Northern Ireland Continuous Household Survey 2022-3.

Although not as low as Wales, the reported levels of adult participation in Northern Ireland have been consistently lower than in Scotland and England. This may be at least in part because of the inclusion of ‘reading’ as a type of surveyed arts participation in England and Scotland and the exclusion of this type from the surveys in Northern Ireland and Wales.

There were significant changes in methodology and content in the 2021-22 Continuous Household Survey, so results from prior years are not directly comparable. However, between 2021-22 and 2022-23 attendance increased by 25 percentage points from 46% to 71%, and participation increased by 3 percentage points from 25% to 28%. This is likely to be in large part due to the imposition and subsequent easing of Covid-19 pandemic restrictions.



"To me, art means creativity and all the ways that people can express themselves. The arts make me more confident and open to new experiences. I find new ways to express myself through the arts and that makes me feel good. People in the arts seem to treat others with more kindness."

– Ellie

Photograph by Ayesha Jones

Arts Education

A society in which the arts are healthy is one in which high-quality arts education is valued and available to all, fostering creativity and developing the artists and audiences of the future.

Arts education has a proven role in contributing to better outcomes for children and young people, developing crucial skills like teamwork, empathy, problem-solving, self-confidence and creativity.³⁶

In the UK, Government frameworks for pre-school education recognise the importance of “expressive arts and design” (England³⁷), “creative development” (Wales³⁸), “expressive arts” (Scotland³⁹) and “the arts” (Northern Ireland⁴⁰). Yet there is unequal access to high-quality early years provision, disproportionately affecting children from lower-income families.⁴¹

The UN Convention on the Rights of the Child affirms that all children should have the right to participate freely in cultural life and the arts.⁴²

Arts education equips people of all ages with valuable skills and knowledge, supports personal development and fosters social cohesion. For some it is also an essential precursor to flourishing careers in the arts.

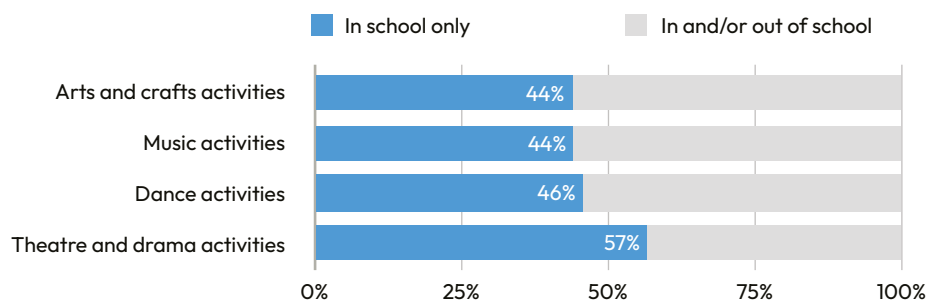
Arts education is delivered in schools, Further Education (FE) colleges and universities, and in local community settings. Therefore funding pressures in the education sector, the cultural sector and local government all affect access to arts education. In policy terms these are all devolved areas and provision can differ across the UK.

The importance of schools for equal access to the arts

Schools provide a vital opportunity for all children to access and experience the arts.

Official statistics collected between 2013-14 and 2019-20 showed that a high percentage of 11-15 year olds in England had only engaged with arts activities at school, and not outside of school, in the prior 12 months.

Figure 38:
Proportion of arts engagements in school only, 11-15 year olds in England, 2013-14 to 2019-20 (average)



Source: Analysis of Official Statistics (DCMS 'Taking Part 2019/20: annual child release').

Notes: All respondents had engaged with the arts in the last year. Average 'In school only' figure between 2013-14 and 2019-20 as a percentage of 'In school only', 'Out of school only' and 'Both'. Excludes 'Did not do activity'. The Taking Part Survey ended in 2019-20.

On average across the 7-year period, of those 11-15 year olds engaging in arts and crafts and music activities, 44% were doing so in school only. This rose to 46% for dance activities. A majority (57%) of 11-15 year olds engaging in theatre and drama activities only did so in school.

The arts on the school curriculum

All 4 parts of the UK have a national curriculum for state-funded schools.⁴³ Fully independent schools do not operate under the same policies and regulations, and therefore their provision can be significantly different.

- **England's** national curriculum requires schools to teach art and design, design and technology (D&T) and music at Key Stages 1 to 3 (ages 5-14), and to offer at least one arts subject and at least one D&T subject at Key Stage 4 (ages 14-16). This is mandatory only for maintained (council-run) schools.⁴⁴
- In the new **Curriculum for Wales**, 'Expressive Arts' is mandatory for all pupils from ages 5 to 16. It encompasses five disciplines: Art, Music, Dance, Drama, and Film and Digital Media.
- **Scotland's Curriculum for Excellence** includes the 'Expressive Arts' (Art and Design, Dance, Drama, and Music) as mandatory subjects to approximately age 15.
- In the **Northern Ireland Curriculum**, Art and Design, Drama and Music are mandatory until the end of Key Stage 3 (age 14).

The arts in primary schools

It is not possible to monitor pre-primary and primary arts education distinctly by using official statistics.

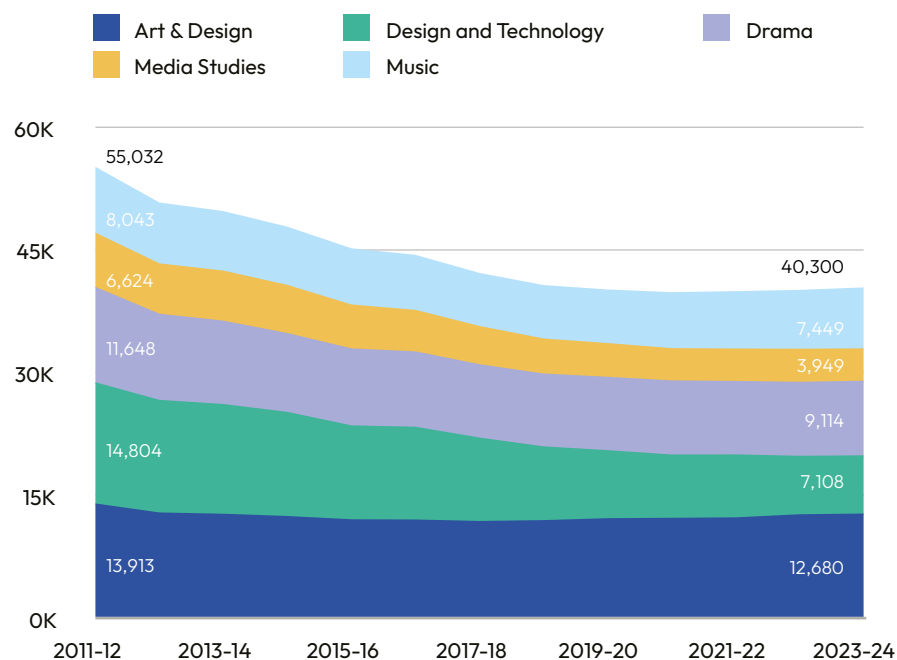
However, there has been a reported decline in the quantity and quality of primary school arts education in England, due to funding reductions and a lack of confidence expressed by primary school teachers.⁴⁵ In a 2019 survey of primary teachers in England, 68% said there had been a reduction in arts provision in their schools since 2010, and 49% felt there had been a decline in the quality of provision.⁴⁶

A 2022 survey in Scotland found that nearly 70% of teachers felt their training had not adequately prepared them to teach art and design in primary classrooms.⁴⁷

Declining arts education in English secondary schools

Official statistics show that the number of arts teachers⁴⁸ in English state-funded secondary schools fell by 27% between 2011 and 2024, from 55k to 40k.

Figure 39:
Number of teachers in arts subjects in English state-funded secondary schools, all years, 2011-12 to 2023-24

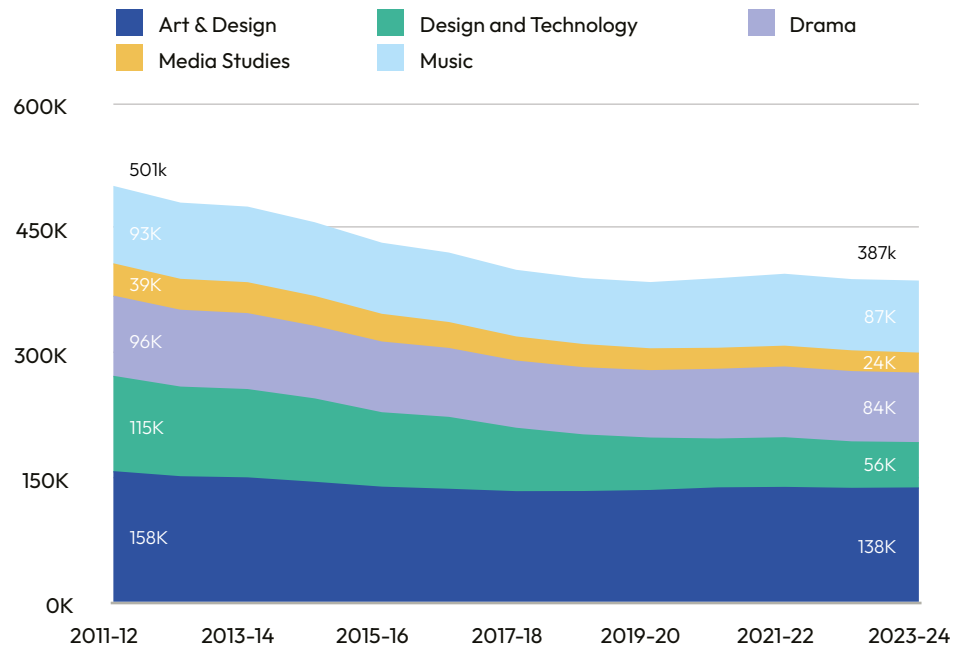


Source: Analysis of Official Statistics (DfE 'School workforce in England', various years). Excludes independent schools, non-maintained special schools, sixth-form colleges and further education establishments.

| Subject | Change in teacher numbers from 2011-12 to 2023-24 |
|-----------------------|---------------------------------------------------|
| Art & Design | -9% |
| Design and Technology | -52% |
| Drama | -22% |
| Media Studies | -40% |
| Music | -7% |
| All Arts Subjects | -27% |

The number of **hours of arts teaching** in English state-funded secondary schools **fell by 23%** between 2011 and 2024, from 501k to 387k.

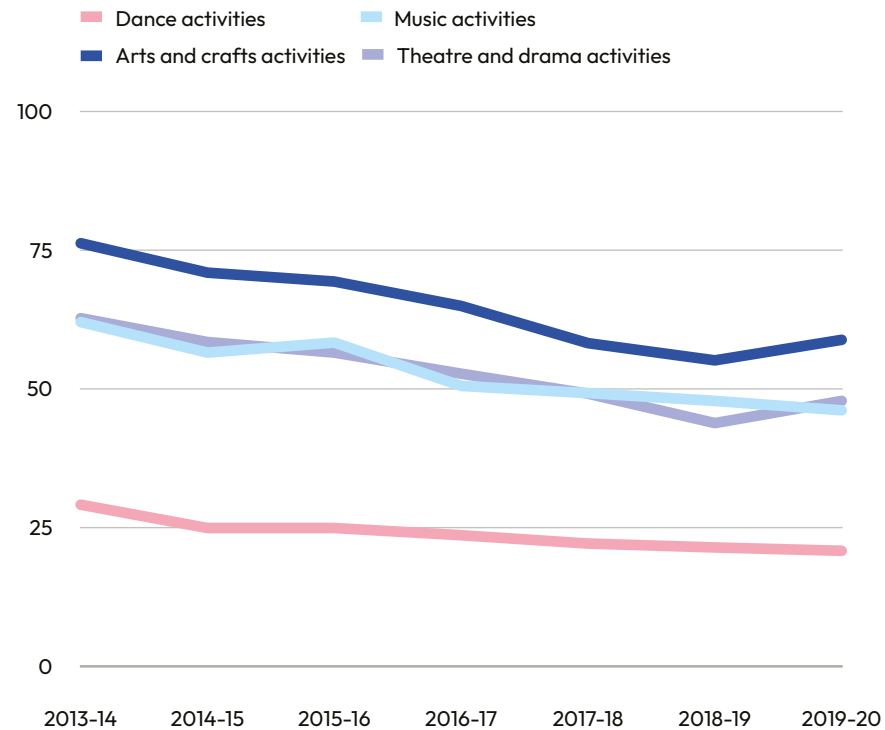
Figure 40:
Number of hours taught in arts subjects in English state-funded secondary schools, all years, 2011-12 to 2023-2024



Source: Analysis of Official Statistics (DfE 'School workforce in England', various years). Excludes independent schools, non-maintained special schools, sixth-form colleges and further education establishments.

| Subject | Change in hours taught from 2011-12 to 2023-24 |
|-----------------------|------------------------------------------------|
| Art & Design | -12% |
| Design and Technology | -52% |
| Drama | -13% |
| Media Studies | -38% |
| Music | -7% |
| All Arts Subjects | -23% |

Figure 41:
Proportion of 11-15 year olds who had engaged with the arts in English schools in the prior year, 2013-14 to 2019-20



Source: Analysis of Official Statistics (DCMS 'Taking Part 2019/20: annual child release').
Notes: Total of 'In school only' and 'Both'. Excludes 'Out of school only' and 'Did not do activity'. The Taking Part Survey ended in 2019-20. Participants selected randomly from households; may include pupils from independent schools and non-maintained special schools.

The reduction in arts teacher numbers and teaching hours does appear to have affected the proportion of secondary pupils engaging with the arts in English schools. From 2013-14 until its closure in 2019-20, the Government's Taking Part survey collected data from a random sample of 11-15 year olds in England, attending schools of all kinds. In 2013-14, at school and in the prior year, 76% had engaged with arts and crafts, 63% with drama, 62% with music and 29% with dance. By 2019-20 the proportion had shrunk by 23% for arts and crafts, 24% for drama, 26% for music and 29% for dance.

Studies have linked these declines to changes in the way secondary schools are assessed and measured in England: in particular, the introduction of the 'EBacc' (English Baccalaureate) in 2010 and the 'Progress 8' performance measure in 2016.⁴⁹

The **EBacc** is used as a measure of school performance in England based on attainment and qualifications in the following subjects: English, mathematics, history or geography, two sciences and a language. Notably this does not include arts subjects. The introduction of the EBacc in 2010 was controversial due to the exclusion of all arts subjects. As a result of this exclusion, Government targets regarding the percentage of pupils achieving the EBacc, and spending cuts⁵⁰, schools have been incentivised to shift focus and resources towards EBacc subjects, marginalising the arts.⁵¹

Progress 8, which measures pupils' performance across eight qualifications, is weighted towards the EBacc subjects. For this reason, it is likely to be contributing to a deprioritisation and diminution of arts subjects in English secondary schools.

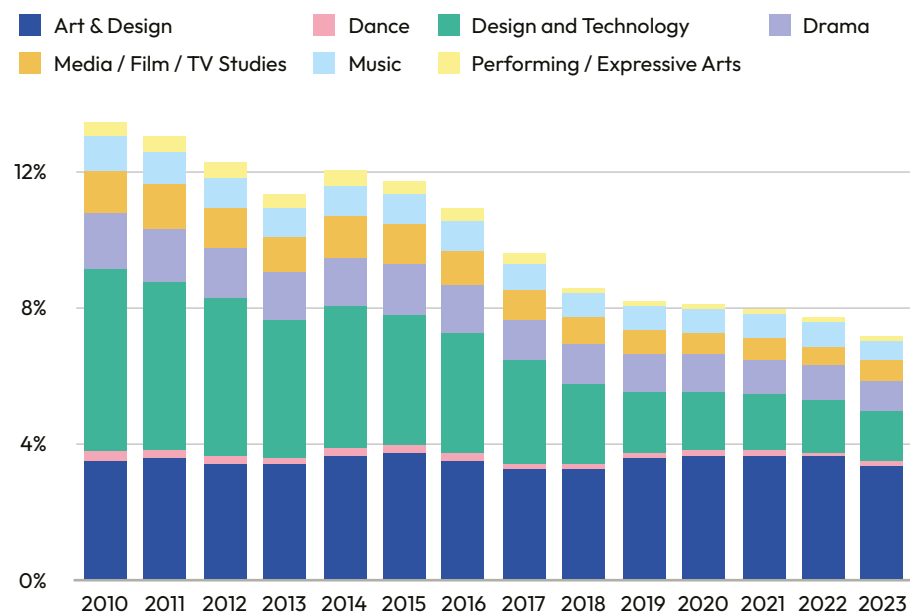
The impact on the number of secondary school students achieving qualifications in the arts in England is evident in an analysis of longitudinal data on entry numbers for those qualifications over the same period.

Arts qualifications across the UK

GCSEs and A-levels are the main qualifications taken by pupils in England, Wales and Northern Ireland. In Scotland, the vast majority of pupils study National 5 qualifications instead of GCSEs, and Higher and Advanced Higher qualifications instead of A-levels.

At GCSE, arts entries have declined by 47% since 2010.

Figure 42:
Entries for arts GCSEs as a percentage of total GCSE entries in the United Kingdom, 2009-10 to 2022-23

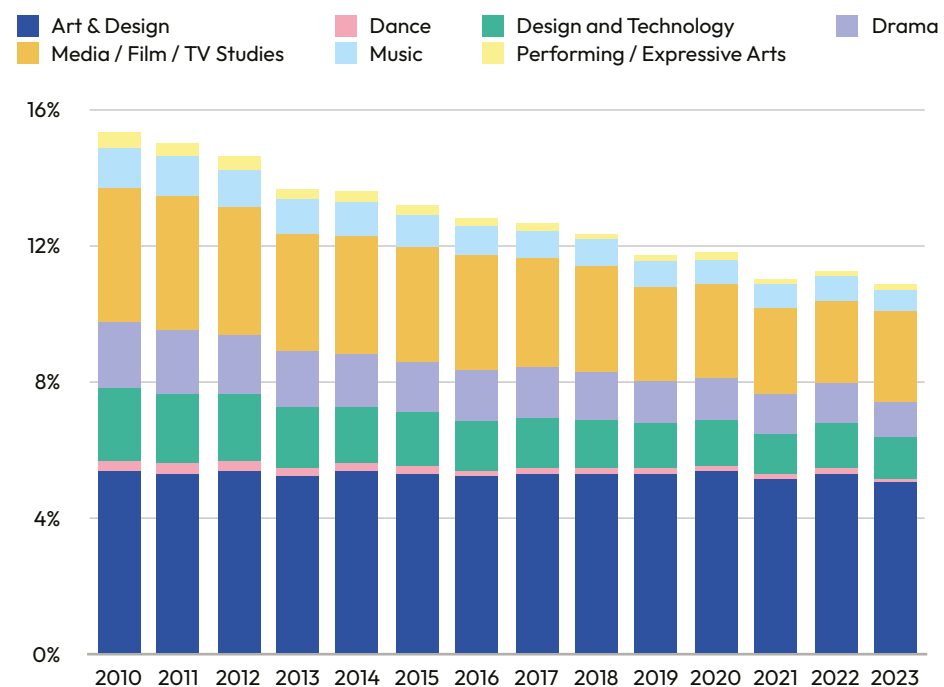


Source: JCQ/AQA. Notes: All UK candidates. Dance figures are from the examining board AQA, since JCQ only reports Dance figures within PE results.

| Subject(s) | Change in arts entries at GCSE from 2009-10 to 2022-23 |
|------------------------------|--------------------------------------------------------|
| Art & Design | -4% |
| Dance | -60% |
| Design and Technology | -73% |
| Drama | -45% |
| Media / Film / TV Studies | -52% |
| Music | -41% |
| Performing / Expressive Arts | -72% |
| All Arts Subjects | -47% |

At A-level, arts entries have declined by 29% since 2010.

Figure 43:
Entries for arts A-levels as a percentage of total A-level entries in the United Kingdom, 2009-10 to 2022-23

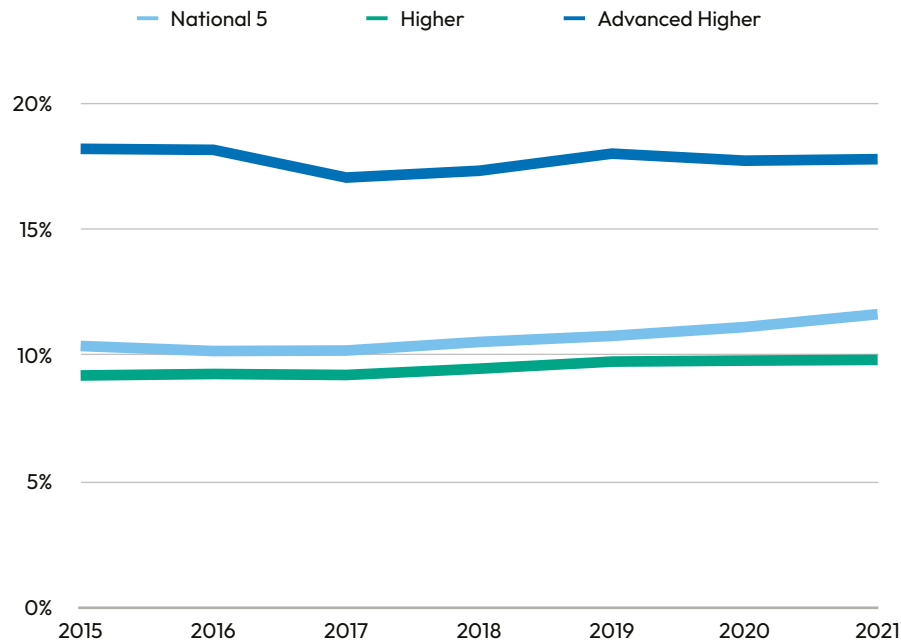


Source: JCQ/AQA. **Notes:** All UK candidates. Dance figures are from the examining board AQA, since JCQ only reports Dance figures within PE results.

| Subject(s) | Change in arts entries at A-level from 2009-10 to 2022-23 |
|------------------------------|-----------------------------------------------------------|
| Art & Design | -7% |
| Dance | -57% |
| Design and Technology | -43% |
| Drama | -45% |
| Media / Film / TV Studies | -32% |
| Music | -46% |
| Performing / Expressive Arts | -68% |
| All Arts Subjects | -29% |

We have not seen the same trend in Scotland. At National 5, Higher and Advanced Higher level, arts entries have remained broadly stable since 2015.

Figure 44:
Entries for arts National 5s, Highers and Advanced Highers as a percentage of total entries, 2015 to 2021



Source: SQA annual statistics of National Qualification entries. Notes: National 5 subjects included: Art & Design, Dance, Drama, Fashion and Textile Technology, Media, Music, Music Technology, Practical Metalworking, Practical Woodworking. Higher subjects included: Art & Design, Dance / Dance Practice, Drama, Fashion and Textile Technology, Media / Media Studies, Music, Music Technology, Photography. Advanced Higher subjects included: Art & Design (Design), Art & Design (Expressive), Drama, Graphic Communication, Music, Music Technology, Music: Portfolio. Data is reported until 2021 as it was the last year the ASR produced the data in this format.

Note: There are several other arts qualifications in the UK that are not GCSEs and A levels, including BTEC (Business and Technology Education Council) qualifications, NVQs (National Vocational Qualifications) and SVQs (Scottish Vocational Qualifications).

Higher Education

The UK is home to some of the world's best universities and conservatoires for arts and creative disciplines.⁵² This and the UK's rich, diverse culture and heritage provides fertile ground for arts and humanities research.

Yet the UK Higher Education sector is increasingly at risk from a structural funding crisis, caused by a decade-long freeze in domestic students' tuition fees (now the primary source of HE funding in England, Wales and Northern Ireland); real-terms reductions in government grants; rising operating costs; and most recently, a drop-off in the number of higher-paying international students.⁵³

There was a sharp, 50% decline in accepted undergraduates from EU countries in 2021-22, following post-Brexit changes to visa requirements and funding rules. Acceptances fell further in the following two years to their lowest level since the reorganisation of the HE sector in 1994.⁵⁴

Funding pressures on UK universities are leading rapidly to course closures and job cuts, and a significant number of these are in arts and humanities departments.⁵⁵

Funding priorities in England

In England, the Office for Students (OfS) is directed by the Government to top up student tuition fees in areas where the cost of delivering courses is particularly high (e.g. because specialist equipment or facilities are required), and/or in areas that are considered strategic priorities for the Government.

Traditionally, ‘high cost subject funding’ has been given to help HE providers meet the higher costs of delivering courses in three bands: A, B and C1.

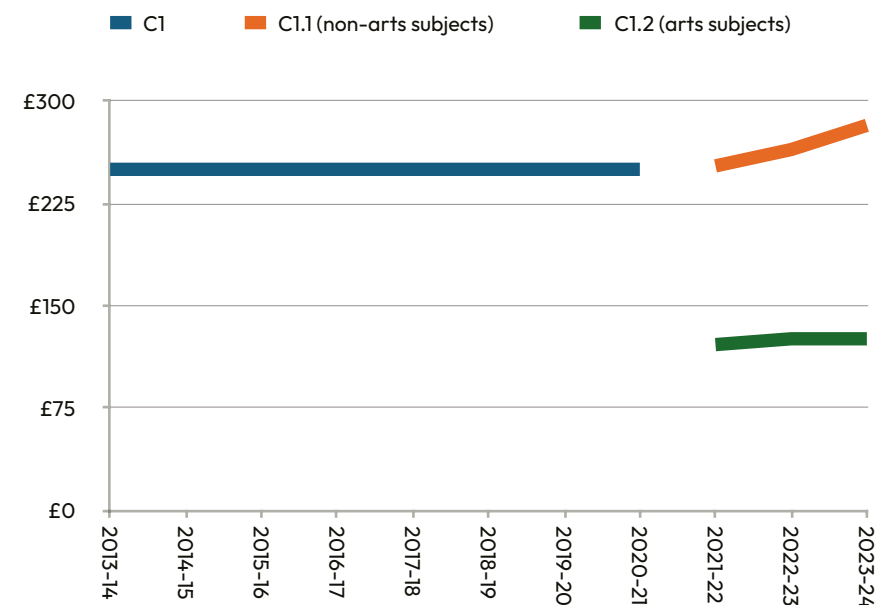
In 2021, the OfS announced: “The government proposes that the courses in price group C1 that are not among its strategic priorities – covering subjects in music, dance, drama and performing arts; art and design; media studies; and archaeology – are to be subject to a reduction of 50 per cent. We will refer to these subjects as constituting a new price group: C1.2.”⁵⁶

Despite 95% of respondents to the OfS’ consultation registering that they strongly disagreed with the proposal, it was implemented anyway, with the caveat that “the Secretary of State has identified archaeology as a strategically important subject that should no longer be subject to this reduction”.⁵⁷

In 2021-22, arts and creative courses were segregated for the purposes of high-cost subject funding and their share of this funding was halved.

Subsequently C1.2 funding has been effectively frozen in nominal terms (a real-terms reduction) even as funding for the other price groups has increased.

Figure 45:
High-cost subject funding for creative arts and design subjects (C1 - C1.2) in Higher Education, funding rate per FTE (£, nominal terms)



Source: HEFCE reports on HE student funding until 2018 when the Office for Students (OfS) was created.

Notes: Previous C1: Intermediate-cost subjects of archaeology, design and creative arts, information technology, systems sciences and computer software engineering, media studies, and pre-registration courses in nursing (OfS, 2021. 20). C1.1: covering pre-registration courses in nursing, provision relating to computing and information technology, and archaeology. C1.2: other price group C1 subjects, covering provision in performing and creative arts and media studies (OfS, 2022. 8). Financial years.

In her 2024-25 guidance letter to the OfS, the former Secretary of State for Education Gillian Keegan appeared to reaffirm that the Government did not consider arts subjects ‘strategically important’, saying the OfS “must increase the funding for strategically important high-cost subjects (i.e. those in price groups A, B and C1.1)”.⁵⁸



"The arts help me to share my unique perspective on the world and I feel that poetry, without a doubt, inspires others. The arts offer the ideal collaborative space for young people to share ideas, work together to create and use the voice of a generation to provoke change."

– Denzel

Photograph by Ayesha Jones

Arts Employment

A society in which the arts are healthy is one in which people can sustain a decent living from their work creating or supporting art.

Different countries have different classifications and assign cultural and creative work differently depending on how their Government departments categorise industry sectors, sub-sectors and occupations. As such the following is an analysis of UK definitions and categorisations. This provides an overview and enables a comparison over time that can be useful in identifying trends and raising questions for future research.

The arts and the economy

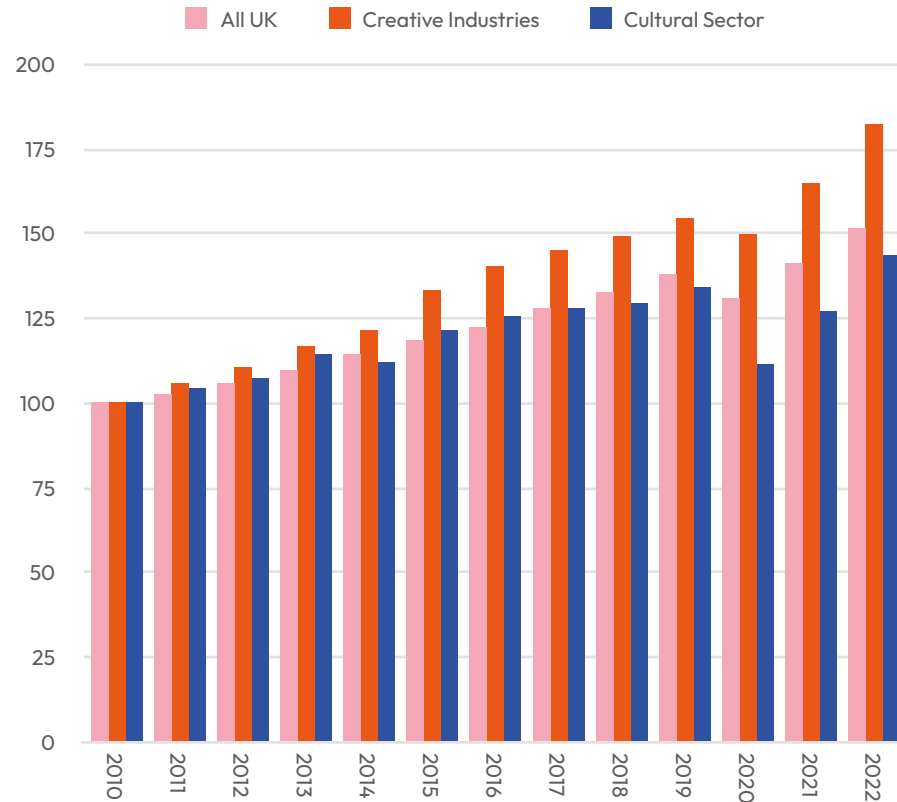
Gross Value Added (GVA) is defined as the full (economic) value created by a product or service minus the intermediate costs of production (goods and equipment for example). It is often used as a measure of the economic health of a sector. Trends in GVA can provide insights into changes in economic health measures over time.

This report does not in any way endorse a view that the Creative Industries or the Cultural Sector only have value in terms of economic growth, and rejects any claim that this should be a primary measure. A rich cultural environment is vital for the health of a society; part of this is delivered within market forces.

The Creative Industries and the Cultural Sector

The DCMS covers a range of sectors including the Creative Industries, the Cultural Sector, Sport, Gambling, Tourism and Civil Society. There is significant overlap between these sectors. The Creative Industries includes much but not all of the Cultural Sector, and also includes advertising and marketing; architecture; publishing; design and designer fashion; IT, software and computer services (these are not included in the Cultural Sector). The Cultural Sector covers all cultural activities including arts, heritage, libraries and cultural education.

Figure 46:
GVA of all UK sectors, the Creative Industries and the Cultural Sector, 2010 to 2022 (indexed, 2010 = 100)



Source: DCMS annual estimates. All figures used derived from chained volume measures

The Creative Industries demonstrated strong growth from 2010 to 2017, followed by slower growth to 2019, then swift recovery from the pandemic. They have consistently grown faster than the UK economy as a whole.

A similar pattern emerged for the Cultural Sector which generally grew faster than the UK economy from 2010 to 2016. GVA then flattened between 2017 and 2019, but overall there was growth broadly in line with the UK average until the pandemic in 2020.

The impact of the Covid-19 pandemic can be seen in the drop between 2019 and 2020. This was a drop of 4.9% in the Creative Industries but more than double that figure at 10.6% for the Cultural Sector. The Cultural Sector includes live events and performances that were closed during the pandemic.

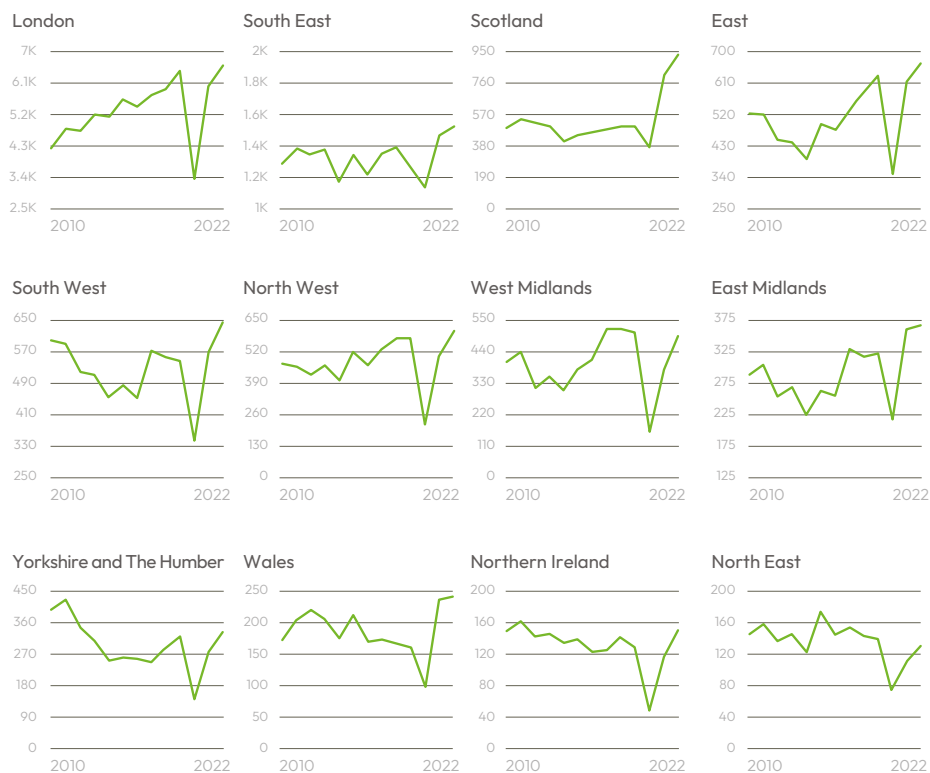
Nevertheless, the Sector has shown strong growth since the pandemic relative to the UK average, albeit from a relatively lower position.

The following sections will use the DCMS statistics for the Cultural Sector only as this enables comparisons. It is acknowledged that this approach omits data from architecture, publishing, gaming and other sub-sectors that are relevant to arts and culture.

GVA by Region

The distribution of GVA across the UK shows a huge concentration in London with significantly higher levels in the South East compared to the rest of the UK. Whilst GVA in London has increased over the period it saw a very deep drop during the pandemic, recovering to above pre-pandemic levels by 2022. GVA in the South East by contrast has remained relatively stable.

Figure 47:
GVA of the Cultural Sector, by nation and region, 2010 to 2022, £ millions



Scotland saw a very significant recovery after the pandemic in 2020. In 2019 GVA was £496m, only slightly above 2010 (£491m) but by 2022 it had jumped to £934m. This is almost double the figure for 2010 and well above growth for any other region including London which otherwise dominates GVA growth in the sector.

Recovery in Wales was also swift. Between 2012 and 2019 there had been an overall decline ending with GVA at £162m in 2019, however in 2022 it was up to £242m. In Northern Ireland there was also a steady decline between 2010 and 2019 with recovery in 2022 at £151m – slightly above the 2010 figure. However it has not seen the post-pandemic growth of the other nations.

Yorkshire and The Humber saw the most significant decline between 2010 and 2019. Whilst it recovered to slightly above pre-pandemic levels at £333m in 2022, it was still well below the 2010 figure of £398m. The South West also saw a gradual decline since 2010 but GVA recovered to levels above both pre-pandemic and 2010 levels by 2022.

The West Midlands by contrast saw significant growth between 2010 and 2019 but in 2022 was slightly below pre-pandemic levels, whilst the North West saw a dip between 2010 and 2014, then growth to 2019 and recovery higher than the previous peak.

Overall the picture is mixed, with significant disparity between the English regions. England, Wales and Scotland show the strongest recovery from the pandemic whilst Northern Ireland, Yorkshire and The Humber and the West Midlands were hit hardest in the pandemic.

Earnings

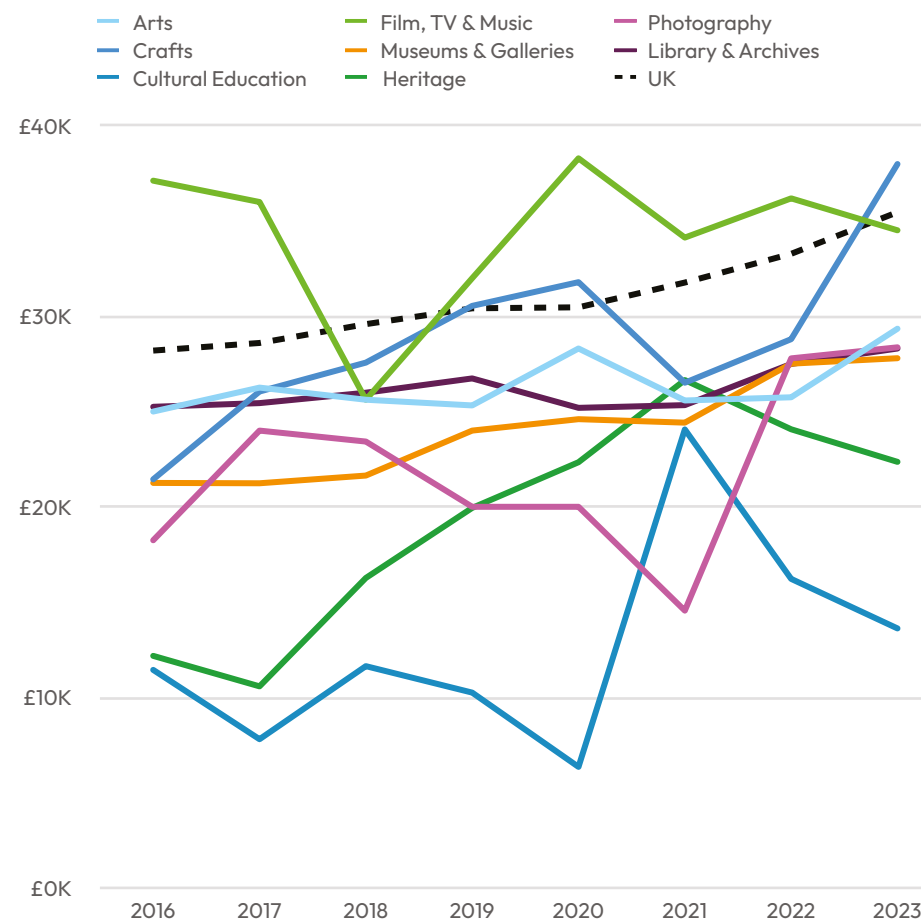
Whilst GVA figures relate to businesses in the Sector, earnings figures are located at the level of the individual. Arts professionals often work across different sub-sectors, going where the work takes them, so they cannot easily be attributed to one sector or sub-sector. For example, an actor might work in film, TV and theatre, and perform in adverts which contribute to the finances of a range of different sectors and subsectors. Nevertheless we have used the DCMS data for the Cultural Sector for consistency in this analysis, with the caveat that the contribution of many workers is not confined to that sector or even to the DCMS sectors.⁵⁹

In 2021-2022 the Creative Industries grew by 9.8% and the Cultural Sector grew by 6.4% compared to growth of 4.4% for the UK as a whole.⁶⁰ At the same time median earnings in the Cultural Sector between 2016 and 2023 dropped by over 17%.

Median earnings dropped by 4% for the UK as a whole in the same period when adjusted for inflation.

This analysis relates to employed earnings only; there is no official, recorded data for self-employed earnings across the DCMS sectors.⁶¹

Figure 48:
Median earnings by Cultural sub-sector, 2016 to 2023



Source: Analysis of official statistics (DCMS Economic Estimates Earnings Annual Gross Pay 2016-2023, ONS Median UK earnings 2016-2023). **Note:** Radio omitted due to incomplete data set.

Median earnings for the cultural education sector are the lowest, and at £13,615 are below relative poverty and potentially absolute poverty thresholds.⁶²

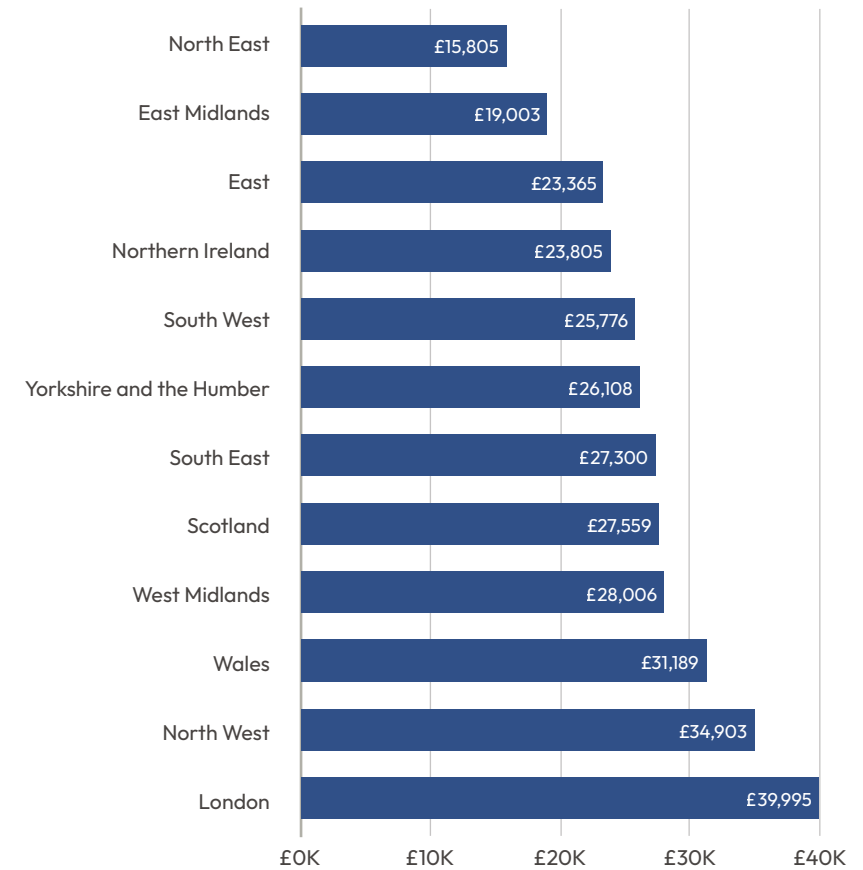
All of the cultural sub-sectors show median earnings below the 2023 UK average (despite GVA growing above average) with the exception of Crafts which increased significantly in the years 2022 to 2023.

Film, TV & Music have shown higher than average earnings with the exception of 2018 and 2023, but 2023 levels are below 2016. This raises questions for the narrative that poor higher education provision is responsible for lower than average graduate earnings for those who stay in the arts and cultural sector.

These figures hide other disparities. For example, across all sub-sectors men are paid 28% more than women but for crafts men earn up to 70% more than women.⁶³

Location was also a factor related to earnings. The London premium is well established with the London weighting allowance applied to public sector pay. Unsurprisingly London showed the highest median earnings for the Cultural Sector and the UK as a whole. The regional order shows that median pay in the North East is less than half of that in the North West.

Figure 49:
Median earnings for Cultural Sector by region, 2023
(employed)



Source: Analysis of official statistics (DCMS Economic Estimates Earnings Annual Gross Pay 2016-2023, ONS Median UK earnings 2016-2023).

In 2023 there was a large disparity between median earnings in London and the North West compared to the East Midlands and North East. Median pay in the East of England is on the whole lower than the West for the cultural sector, showing an East-West divide above the regional South and particularly in the regional North.

Whilst it is expected that there is a premium in large cities that are often hubs for cultural activities and serve more citizens in terms of population density, it is notable that median earnings in the West Midlands are nearly £7,000 below the North West.

This analysis provides an overview of the data but there was variation between regions at the level of sub-sectors. Overall, the lowest earnings were found in the East Midlands, North East and Northern Ireland. For example, in film, TV, radio and photography the median earnings in London are £45,000; in the East Midlands the figure is £11,904. For design and fashion in London the figure is £47,000; it is £32,620 in the East Midlands and £22,000 in Northern Ireland. London was consistently the highest-earning region across all sub-sectors, although the disparity was much less pronounced in the museums and galleries sub-sector. There was insufficient data to analyse figures for libraries and archives.

There is no official data for the earnings of freelancers. This is partly because freelancers in the sector often work across a range of jobs and sectors in various capacities from fully self-employed to PAYE employment.

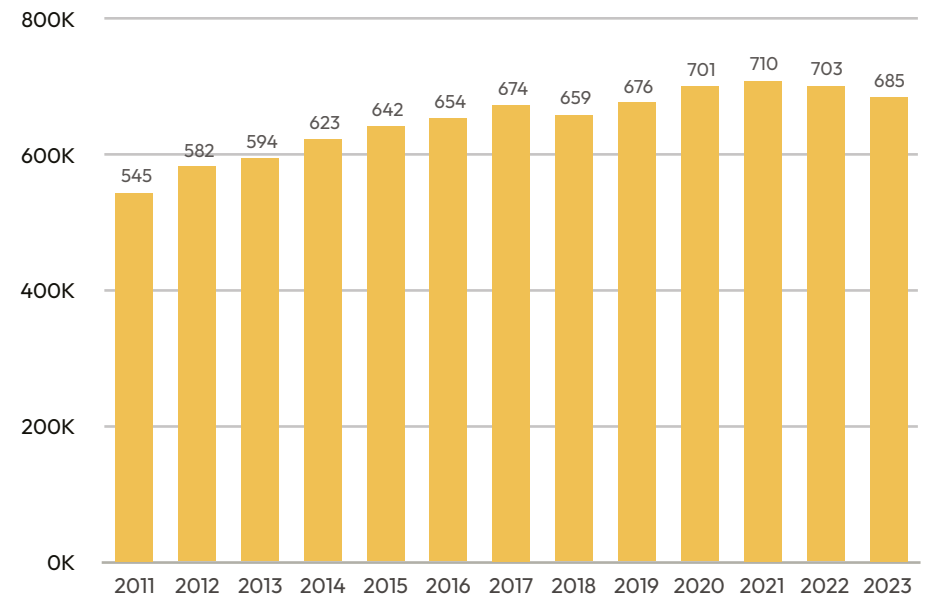
Reports by worker groups such as trade unions suggest that self-employed income is also low. For example, in 2023 Equity⁶⁴ reported that average annual earnings for their surveyed members was just over £15,000. In the same year Freelancers Make Theatre Work⁶⁵ reported in their survey that respondents averaged £16,900 in their first decade of work. These cannot be taken as overall figures for the sector but are indicative.⁶⁶ Low wages and precarity pose challenges for the sustainability and diversity of the sector. If earnings continue to fall whilst the cost of living continues to rise, those without additional financial means will be forced to leave the sector.⁶⁷

This analysis also raises questions around the distribution of wealth created in the sector.

Employment

Between 2011 and 2023 the total number of jobs in the cultural sector grew. However, the figures dipped in 2018 and again in 2022 and 2023.

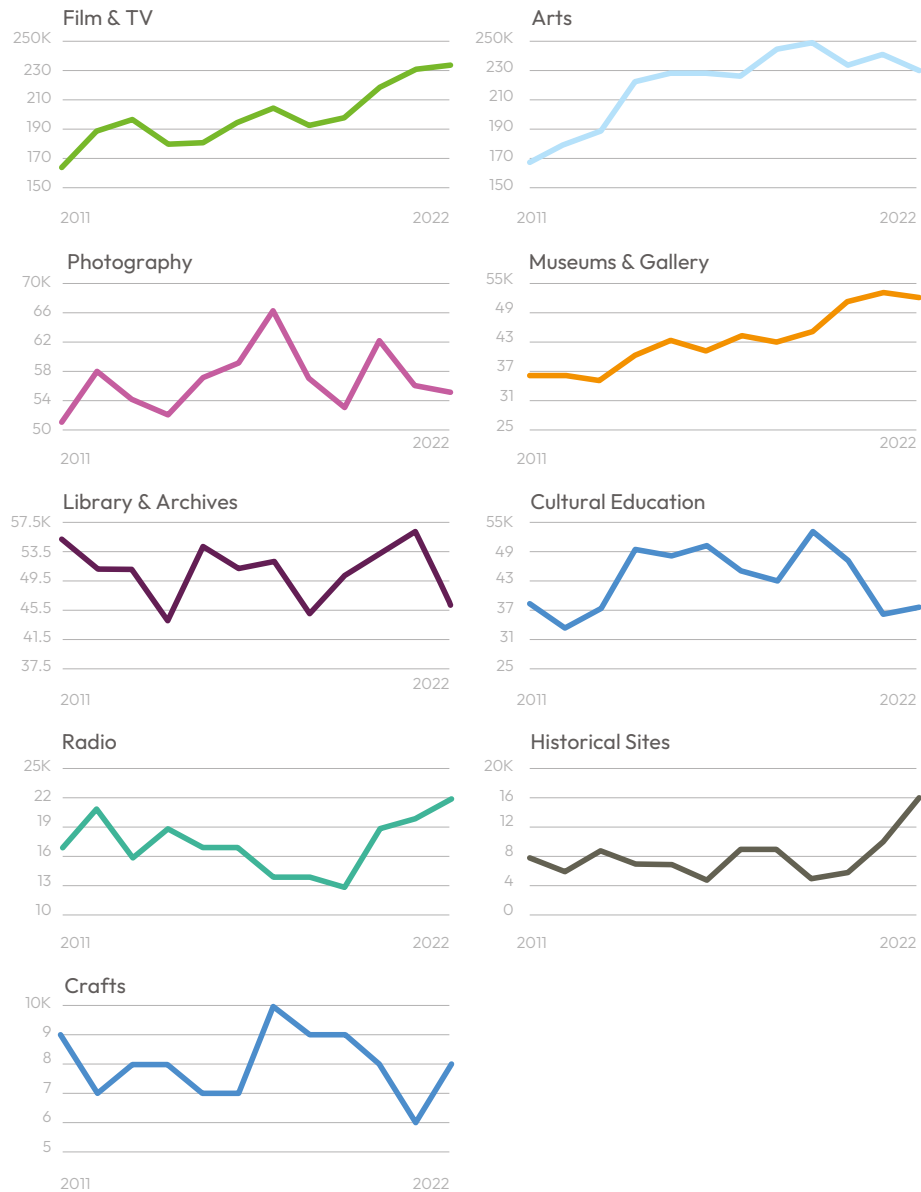
Figure 50:
Number of filled jobs in the Cultural Sector (employed), 2011 to 2023 (thousands)



Source: Analysis of official statistics (DCMS National Economic Estimates Employment Jan to Dec 2011-2020 and April 2021 – March 2022).

When broken down by sub-sector for the Creative Industries and Cultural Sector, nuances appear.

Figure 51:
Number of filled jobs in the Cultural Sector
(employed), by sub-sector, 2010-11 to 2021-22



There is a significant and sudden rise in operating historical sites, from a low of 5,000 jobs in 2019 before the pandemic to 16,000 in 2022. The arts have shown steady growth before levelling off from 2017. These are however PAYE jobs and not indicative of the sub-sector as whole which employs a large number of freelance workers.

Jobs in libraries and archives have dropped since the pandemic with little recovery evident up to 2022. In crafts they have also dropped below 2011 levels.

The cultural education sub-sector is showing employment rates just above those recorded in 2011. Despite an upward trend overall in the first decade there is a sharp drop between 2019 and 2021.

Freelance Workers

The cultural and creative sectors are heavily reliant upon a highly skilled, highly flexible workforce. This flexibility is met by freelance workers. For these workers there is no structured career; they may work at a high level in one job and a lower level in the next, and take work opportunities as and when they can.

The sustainability of this workforce is vital for a sector dominated by project-based modes of production. However, the lack of regulation in many of these labour markets and the lack of employment rights in existing policy frameworks due to a current lack of work status for these types of freelancers creates precarity that exacerbates the problem of low earnings.

As with all elements of employment there are variations in the numbers of freelancers depending on the sub-sector and region. It should be noted that many freelancers will gravitate to where the work opportunities and infrastructures are, but they are also nomadic – for example working on tours or working abroad for periods of time. The percentage of the self-employed workforce based in each region is given below.

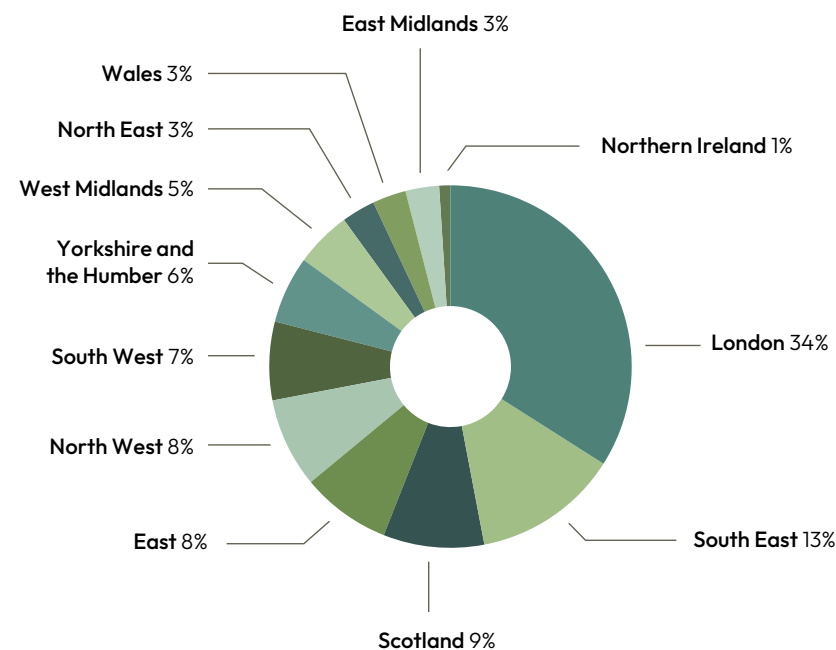
Freelance work is not defined in policy or law, and as such this category covers the full spectrum of self-employment. This ranges from those who are self-employed in absolute terms – with the ability to negotiate fees, decide the timeframe for work completion, delegate work and employ others – to those who are reliant upon short-term contracts with time, conditions and pay set by the employer, often with a line manager and no option to delegate. The chart on the right includes all kinds.

Self-employed workers are concentrated in London and the South East with these regions representing nearly half (47%) of the entire self-employed workforce in the Cultural Sector. The distribution of those employed follows a similar trend, with nearly half of all jobs located in London and the South East.

Scotland has 9% of the total number of self-employed workforce, Wales 3% and Northern Ireland 1%.

Despite the growth in GVA across the sector, earnings are below the median for the UK and the distribution of jobs and wealth, whilst partly related to population size, also shows some stark contrasts. The findings question the sustainability of a sector that is reliant upon precarious freelance and self-employment and relatively low pay.

Figure 52:
Distribution of freelance workers
in the Cultural Sector, by nation and region, 2022



Source: Analysis of official statistics (DCMS Economic Estimates).

Volunteering

The Cultural Sector is heavily reliant upon volunteers.

Some of the work undertaken is undisclosed such as working for profit-share productions or supporting research and development activities in production companies with the hope of future work (working for free).

Other volunteering is formalised and common in museums and galleries (the Natural History Museum for example states on their website that they have more than 500 volunteers⁶⁸), front of house in theatres, and at heritage sites. The National Trust has 7,608 employees and 40,000 volunteers⁶⁹ that “donate their time in more than 500 roles to support what we do”.⁷⁰

There are no official data sets for volunteer workers but it is clear that volunteers make up a significant amount of the workforce in the cultural sub-sectors working for free. Their vital contribution should be acknowledged, and better data would enable a fuller analysis of their contribution.

Endnotes

- 1 Unless otherwise stated, adjustments for inflation are calculated using the HM Treasury GDP deflator (November 2023, Autumn Statement).
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- 3 All are members of the European Union except Iceland, Norway, Switzerland and the United Kingdom.
- 4 Population, GDP and Purchasing Power Parity data.
- 5 Previously the Department for Digital, Culture, Media & Sport (until February 2023).
- 6 [Public spending by country and region](#), House of Commons Library
- 7 The 'creative industries tax reliefs' are a collection of tax reliefs distinct from the DCMS classification of the 'creative industries' sector.
- 8 [Levelling up funding to local government: Twenty-first report 2023-24](#). House of Commons Committee of Public Accounts: 2024: p5.
- 9 [Levelling Up prospectus](#), HM Treasury, Ministry of Housing, Communities & Local Government and Department for Transport, pg 8
- 10 [UK Shared Prosperity Fund: prospectus](#), Department for Levelling Up, Housing & Communities, section 2.1
- 11 [Towns Fund Prospectus](#), Ministry of Housing, Communities & Local Government, pg 9
- 12 £429m from Round 1 (Source: [Written evidence submitted by Five10Twelve](#)), £548m from Round 2 (Source: [Levelling Up Round 2: thematic and geographic analysis](#)), £100m from Round 3 (Source: [Levelling Up culture projects: methodology note](#))
- 13 [New £250 million Culture Investment Fund launched](#). Gov.uk. Press Release, 12th October 2019.
- 14 [Evaluation of the Culture Recovery Fund](#), Department for Culture, Media and Sport, pg 9
- 15 [Investigation into the Culture Recovery Fund: Department for Digital, Culture, Media & Sport](#). National Audit Office, 2021
- 16 [Liverpool City Region introduces 1% for culture programme to support cultural activities](#), Liverpool City Region CA
- 17 [Research into the classical music ecosystem](#). BOP Consulting. Report for the BBC, 2022.
- 18 [What is BBC Music Introducing?](#), BBC
- 19 Under Pressure: council spending on culture and leisure, Local Government Association
- 20 [Decade of austerity sees 30% drop in library spending](#), CIPFA
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- 23 [Cultural Infrastructure Map](#), Greater London Authority
- 24 [Ministers plan to push cash-strapped English councils to sell assets](#), The Guardian
- 25 [Parallel lives: Regionally rebalancing wealth, power and opportunity](#), IPPR
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- 27 Fancourt, Daisy & Finn, Saoirse. (2019). [What is the evidence on the role of the arts in improving health and well-being? A scoping review](#). World Health Organization. Regional Office for Europe.
- 28 A separate Taking Part child survey monitored children's arts engagement in England until it was discontinued in 2019/20.
- 29 [Participation Survey](#), Gov.UK
- 30 [Scottish Household Survey 2022: methodology and fieldwork outcomes](#), Gov.scot
- 31 [National Survey for Wales](#), Gov.wales
- 32 [Continuous Household Survey 2022/23](#) – Technical Report, NISRA
- 33 [Digital 2024 United Kingdom Report](#), We Are Social
- 34 The change was greater than the confidence intervals for both years.

- 35 Some categories were added, and some reworded, for the 2022 survey. However the Scottish Government has said “the changes to the response options are small enough that it is reasonable to make comparisons between 2019 and 2022”.
- 36 Tambling, P. and Bacon, S. [The Arts in Schools: Foundations for the Future](#). Calouste Gulbenkian Foundation, 2023: p13.
- 37 [Early years foundation stage \(EYFS\) statutory framework](#). Gov.UK. Department of Education, 31st March 2014, updated 19th January 2024.
- 38 [Curriculum for Wales: Foundation Phase Framework](#) (Revised 2015). Welsh Government, 2015. hwb.gov.wales.
- 39 [Expressive Arts, Curriculum for Excellence](#). Education Scotland.
- 40 [Curricular Guidance for Pre-School Education](#), Department of Education. CEA Rewarding Learning, 2018.
- 41 [Inequality in Early Years Education](#), Sutton Trust, 2024
- 42 [The United Nations Convention on the Rights of the Child](#), UN, 1990.
- 43 Academies and free schools which are funded directly by the Department for Education rather than via local councils have more freedom to design their own curricula provided they teach a “balanced and broadly based curriculum”. In 2023-24, this was 43% of primary schools and 82% of secondary schools.
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- 49 Johnes, R. [Entries to arts KS4](#). Education Policy Institute, 2017. Prior L., Jerrim J., Thomson, D. & Leckie, G. ‘A review and evaluation of secondary school accountability in England: Statistical strengths, weaknesses challenges for ‘Progress 8’ raised by COVID-19’. BERA, Review of Education. 9(3), 2023.
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- 54 [International students in UK higher education](#). UK Parliament. House of Commons Library, 28th May 2024.
- 55 [UK HE shrinking](#). UCU Queen Mary University of London.
- 56 [Consultation on recurrent funding for 2021-22](#). Office for Students, 2021.
- 57 [Recurrent funding for 2021-22: Outcomes of consultation](#). Office for Students, 2021, p29.
- 58 Keegan, G. Secretary of State for Education. [Guidance to the Office for Students from the Secretary of State for Education on the allocation of Strategic Priorities Grant funding for the 2024-25 Financial Year and associated terms and conditions](#). Department for Education. Office for Students, 4th April 2024.
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- 60 [DCMS Sectors Economic Estimates](#). Gov.uk. Department for Culture, Media and Sport and Department for Science, Innovation and Technology, August 2016, updated June 2024.
- 61 Caution is advised, figures are taken from data derived from Standard Occupation Classification (SOC) and Standard Industrial Classification (SIC) codes.
- 62 Calculations for relative and absolute poverty are related to family status.
- 63 Taken from Economic Estimates Annual Gross Pay 2016-2022 Crafts 2 in the Cultural Sector

- 64 Ashton, H. [Not Here to Help: Equity members experiences of Universal Credit and the Minimum Income Floor](#). Report by Equity and University of Warwick. 2023.
- 65 [Big Freelancer Survey 2023](#). Freelancers Make Theatre Work, 2023.
- 66 For a fuller review of pay in the sector see see Banks, M. Creative Justice: Cultural Industries, Work and Inequality, London; Rowman and Littlefield. 2017
- 67 The lack of support for those facing periods of unemployment has also been noted in the Equity report 'Not Here to Help'.
- 68 [Volunteer](#), Natural History Museum
- 69 [The National Trust for Places of Historic Interest or Natural Beauty](#), Register of Charities, Charity Commission
- 70 [Meet the volunteers](#), National Trust



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