ARTS COUNCIL ENGLAND

Statistical report 8

A statistical survey of regularly funded organisations

2003/04

Alan Joy

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Foreword

Each year, Arts Council England conducts a survey of regularly funded organisations. The survey collects information on attendance, the number of performances and new works commissioned, income and expenditure, as well as staff and employment. It helps us to find out about what has been achieved as a result of a major strand of our funding.

There are a number of reasons why we ask organisations to complete the survey:

- It provides essential information for reporting to the Department for Culture, Media and Sport (DCMS) and the Treasury about what has been achieved as a result of their funding
- It helps us in our bid to lever more funding for the arts sector
- The survey also contributes to policy development and practice. For example, survey results were used to inform the Theatre Review
- It allows international comparisons of arts-related practice
- Arts organisations can compare their own activities with the wider sector
- Survey information forms part of the Arts Council's monitoring procedures

2003/04 was the tenth year in which regularly funded organisations of Arts Council England were asked to provide a range of information in our annual survey. That information provides the basis of this published report, which is the eighth in the series.

We would like to thank all the organisations that responded for the time and effort they spent participating in the survey. We would also like to thank those who were involved in the administration and compilation of this report. Particular thanks go to Megan Skinner, Michelle Jobson and Jacinta Phillips.

Catherine Bunting, Director of Research

Executive summary

The executive summary is in two sections:

The first section explores data supplied by the full sample of 628 organisations in receipt of regular ongoing funding from Arts Council England. The results for the full sample of 628 organisations in the 2003/04 survey are not directly comparable with those from the full sample of 604 organisations in the 2002/03 survey because of the different set of organisations responding to each survey.

The second section makes year-on-year comparisons based on data supplied by 524 organisations that responded to the survey in both 2002/03 and 2003/04. We refer to these as the 'constant sample'.

1 Full sample of regularly funded organisations

Overall analysis

Income and expenditure of regularly funded organisations in 2003/04

Income	**£000s**	**%**	**Expenditure**	**£000s**	**%**
Earned income	305,324	43	Artistic programme costs	275,612	39
Arts Council subsidy	268,423	38	Education costs	25,269	4
LA and other public subsidy	80,670	11	Marketing costs	33,286	5
Contributed income – sponsorship, trusts and donations	60,096	8	Overheads, staffing and other costs	369,958	53
Total income	714,513	100	Total expenditure	704,125	100

Base: full sample of 628 organisations responding to survey

The 628 organisations participating in the survey reported:
- a total income for 2003/04 of £714.5 million
- a total expenditure of £704.1 million
- a total annual surplus of £10.4 million
- an accumulated surplus of £63.3 million

These organisations delivered:
- 126,130 performances, exhibition days and readings, 9,292 of which were performances for school children
- attendances at these events totalling 29.7 million
- attendances for workshop-related sessions amounting to 3.6 million

- a reported audience for published and broadcast work totalling 174.0 million

The total subsidy per attendance was £10.48 (of which Arts Council subsidy was £8.06) and earned income per attendance was £9.16.[1]

Artform analysis

Income and expenditure by artform in 2003/04

	Number of organisations	Total income £000s	Total expenditure £000s
Combined arts	98	78,473	78,342
Dance	53	89,718	88,714
Literature	35	7,734	7,601
Music	85	185,302	184,391
Theatre	174	251,865	245,623
Visual arts	136	77,850	75,789
Support, umbrella and networking (SUN) organisations	47	23,572	23,665
Total	628	714,513	704,125

Base: full sample of 628 organisations responding to survey

Of income in the artform sectors:
- theatre and music received the largest share of Arts Council subsidy (£87.6 million and £71.5 million respectively)
- literature received the smallest share (£3.1 million)
- as a proportion of organisations' total income, Arts Council subsidy accounted for 38% of income overall, but across artform sectors the figure ranged from 31% (combined arts) to 42% (both dance and visual arts)

As a proportion of total income, local authority (LA) and other public subsidy ranged from 4% in dance to 19% in both combined arts and visual arts. Contributed income accounted for between 6% of income (both combined arts and theatre) and 12% (both music and literature).

Earned income – revenue generated from ticket sales, workshop fees, merchandising, programmes and so on – accounted for 42% or more of income in four artform sectors, ranging from 42% for music up to 48% for theatre. Visual arts

[1] See Chapter 1 for a description of subsidy per attendance calculations.

organisations generated 29% of their income through earnings and literature organisations generated 34%.

As a proportion of total expenditure:
- artistic programme costs ranged from 29% (visual arts) to 44% (music)
- overheads, staffing and other costs ranged from 45% (literature) to 62% (visual arts)
- marketing expenditures were all between 4% and 7% of total expenditure
- in literature, education accounted for 17% of total expenditure whereas across the other sectors education costs amounted to between 2% and 5% of total expenditure

All six artform sectors recorded a financial surplus for the year: combined arts (£131,000), dance (£1.0 million), literature (£133,000), music (£911,000), theatre (£6.2 million), and visual arts (£2.1 million).

All sectors reported an accumulated surplus to be carried forward. These ranged from £589,000 (literature) to £20.4 million (theatre). In the constant sample, the level of the accumulated surplus (£58.1 million) highlights that there were financial transfers of approximately £12.3 million of 'extraordinary items' into the two national theatre companies.

In terms of attendance:
- total attendance at performances or exhibition days and workshop-related sessions was 33.3 million
- the theatre companies reported the highest aggregate attendance figures (including workshop-related sessions) at 11.4 million
- the visual arts sector reported 8.6 million total attendances, combined arts reported 6.8 million, music reported 4.1 million and dance reported 2.0 million
- Arts Council subsidy per attendance was highest in dance (£18.67) with music at £17.42 and theatre at £7.65. Total subsidy per attendance ranged from £5.50 in visual arts to £21.09 in music
- earned income per attendance ranged from £2.65 (visual arts) to £19.91 (dance)

National companies

The six national companies – the Royal Opera House (including Royal Ballet), English National Opera, Birmingham Royal Ballet, South Bank Centre (including Hayward Gallery and Royal Festival Hall), Royal National Theatre and Royal Shakespeare Company – continued to have a major impact on the arts economy:

- they generated 28% of the total income and accounted for 29% of the total expenditure of the 628 organisations responding to the survey
- they received £93.3 million in Arts Council subsidy, accounting for 35% of total Arts Council subsidy distributed to the organisations responding to the 2003/04 survey
- they generated 28% of all earned income and received 32% of total contributed income
- total attendance at performances or exhibition days and workshop-related sessions provided by the national companies added up to 4.6 million, 14% of the total audience for the organisations responding to the survey
- total subsidy per attendance was £20.99 and earned income per attendance was £18.67

Touring

A total of 35,617 toured performances and exhibition days were undertaken by the organisations participating in the survey, with 28,537 of the toured performances and exhibition days occurring in England:

- theatre and visual arts together accounted for 80% of all toured work and 79% of touring in England
- London received the largest amount of toured work in England, 24% of the total number of performances and exhibition days, followed by the South East (16%) and the South West (13%). Yorkshire and the West Midlands regions had the lowest level of toured work (each 7%)

New works

A total of 3,357 pieces of new work were commissioned in 2003/04, by 401 organisations – 64% of all organisations. Visual arts accounted for 34% of the number of new works, followed by theatre with 18%.

Education, learning and participatory arts

The survey form in 2003/04 included a combined section on education, learning and participation by, for and with audiences and user groups. This is a development of the combined section used in the previous two surveys and for professional training gathers information on type of professional training rather than the age of the recipients. Comparisons may be made between the two years, although they relate to the full sample in each year and so are not the same set of organisations. The total figure for attendances is 3.6 million, up from 3.2 million in 2002/03, although the number of sessions decreased from over 183,000 to 179,000. The number of artists involved with the programmes was reported at

25,042 compared to 33,686 in 2002/03, and the number of educators also fell, from 18,698 to 14,957.

Cultural diversity
Forty organisations (6%) are Black or minority ethnic-led, using the criteria set out in Appendix 5. A further 174 companies (28% of the total) reported that some part of their activity during the year were Black or minority ethnic-led. Fourteen organisations (2%) are disability-led, using the criteria set out in Appendix 5. A further 136 companies (22% of all organisations) reported that some part of their activity during the year was disability-led.

Equal opportunities
Overall, 59% of permanent employees were female (58% in 2002/03) but the majority of board and management committee members were male (58%), as in 2002/03. Contractual staff were 52% male and 48% female. Seven per cent of permanent employees, 16% of contractual staff and 11% of board members were Black or minority ethnic. Two per cent of permanent employees, 2% of contractual staff and 4% of board members were disabled people.

2 Constant sample of regularly funded organisations

Overall analysis
In 2003/04, total income for the constant sample of 524 organisations increased by £34.7 million (6%) to £660.2 million, while total expenditure increased by £31.3 million (5%) to £651.8 million.

There were increases in three areas of income:
- earned income by £13.2 million (5%)
- Arts Council subsidy increased by £18.5 million (8%)
- local authority and other public subsidy by £5.3 million (8%)

Contributed income fell by £2.3 million (4%)

There were also increases in three areas of expenditure:
- artistic programme expenditure increased by £8.8 million (4%)
- education programme expenditure increased by £2.2 million (10%)
- overheads, staffing and other costs by £20.6 million (6%)

Marketing costs decreased by £306,000 (1%).

Income and expenditure for constant sample of funded organisations in 2002/03 and 2003/04

	2003/04		2002/03	
Income	**£000s**	**%**	**£000s**	**%**
Earned income	285,335	43	272,114	44
Arts Council England subsidy	249,449	38	230,940	37
Local authority and other public subsidy	69,266	10	63,965	10
Contributed income – sponsorship, trusts and donations	56,178	9	58,503	9
Total income	660,228	100	625,522	100
Expenditure	**£000s**	**%**	**£000s**	**%**
Artistic programme costs	254,810	39	246,045	40
Education costs	23,531	4	21,342	3
Marketing costs	31,380	5	31,686	5
Overheads, staffing and other costs	342,124	52	321,507	52
Total expenditure	651,845	100	620,580	100

Base: constant sample of 524 organisations responding to surveys in 2002/03 and 2003/04

The constant sample had an annual surplus of £8.4 million (£3.4 million more than that of 2002/03) and an accumulated surplus of £58.1 million – after the addition of over £12 million of 'extraordinary' items.

The number of performances and exhibition days delivered by the constant sample:

- increased by 9,432 (9%) to 106,803
- attendances at these events decreased by 1% to 26.7 million
- attendance at workshop-related sessions increased by 12% to 3.3 million
- Total attendance rose 1% to 29.9 million

With increases in the levels of Arts Council, local authority and other public subsidy of 8% and an attendance increase of 1% overall, the total subsidy per attendance increased by £0.75 (8%) to £10.65. Earned income per attendance increased by 4% to £9.53.

Artform analysis
Total income increased in all six artform sectors:
- in percentage terms, the largest increase was in combined arts (10%) and the smallest was in literature (1%)
- in cash terms, increases ranged from £40,000 in literature to £15.0 million in theatre

In terms of the different income streams:
- four sectors reported increases in earned income – combined arts, dance, theatre and visual arts
- all sectors had increased Arts Council subsidy, with theatre having an increase of £7.0 million (9%) and music £5.9 million (9%)
- all sectors other than literature had increased local authority and other public subsidy, with theatre reporting an increase of £3.3 million (16%)
- five sectors reported increases in contributed income with only theatre reporting a fall

Total expenditure increased in all six sectors:
- in percentage terms, the largest rises were in combined arts and literature (each 12%) and the smallest in music (1%)
- in cash terms, the largest increase was in theatre (£9.5 million) and the lowest increase in literature (£756,000)

In terms of the different areas of expenditure:
- expenditure on artistic programming increased in three sectors and declined in three
- four sectors had increased spending on marketing and two reported falls
- education expenditure increased across five sectors with only music reporting a small fall (1%)
- all sectors reported increased overheads, staffing and other costs

Four sectors reported increased numbers of performances and exhibition days, with two, dance and music, recording falls.

In terms of audiences and attendance:
- reported attendances at performances, exhibition days and readings increased in combined arts (10%) and theatre (under 1%), and fell for dance (5%), music (12%) and visual arts (4%). Attendance increased at literature events
- attendance figures reported for workshop-related sessions showed increases in combined arts (31%), theatre (9%), music (16%) and visual arts (18%)

- dance and literature had lower workshop attendances (down 4% and 15% respectively)

Subsidy per attendance:

- the total subsidy per attendance rose for all artforms except combined arts
- increases were: dance (11%), literature (11%), music (21%), theatre (10%), visual arts (6%)
- combined arts decreased by 6%
- dance, music, theatre and visual arts had increases in both Arts Council England and local authority and other public subsidies per attendance; combined arts had decreases in both subsidy measures and literature had an increase in one subsidy and a decrease in the other
- earned income per attendance increased for combined arts (2%), dance (8%), music (6%), theatre (7%) and visual arts (17%)

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1 Background to the findings

General

This report is based on information provided by 628 arts organisations in receipt of regular funding from Arts Council England. The data were supplied between August 2004 and August 2005 in response to an annual survey. Appendix 7 provides a full list of the participating organisations, divided into six artform sectors – combined arts, dance, theatre, music, literature and visual arts – and includes a list of support, umbrella and networking (SUN) organisations that are analysed as a group and not included in the artform analyses.

All grant-in-aid funding and lottery revenue funding to these organisations are included within income. Data relating to lottery funded capital grants are not included.

The sample population

The figures reported reflect those funded organisations which submitted a completed survey form. The sample of responding organisations differs from year to year, some submitting one year and not the next. In some cases, funding may have ceased, or organisations may be receiving funding for the first time.

Comparisons with previous years (the constant sample)

The differences in the number of funded organisations making returns in the financial years 2002/03 and 2003/04 mean it is difficult to extract trend data and make year-on-year comparisons. A detailed examination of funded organisations covered in the survey shows:

- 524 organisations reported in both 2002/03 and 2003/04
- 80 organisations reported in 2002/03 and not in 2003/04
- 104 organisations reported in 2003/04 and not in 2002/03

The 2002/03 survey organisations included here are the 604 organisations reported on in Arts Council England's *Statistical report 7.* Data for a small number of these organisations have been revised with updated information.

In this report we supply data on all organisations making returns in 2003/04 and refer to these responding organisations as the full sample.

When comparing 2003/04 data with 2002/03 data, this is generally done for those funded organisations making returns in both these years. We refer to organisations supplying data for two years consecutively as a constant sample.

In chapters dealing with the main artform sectors, constant samples are used to enable some year-on-year comparison to be made. This means we are comparing data for just those funded organisations responding to the survey over two years and the sample may not be representative of all funded organisations in a particular sector.

Data for small sub-samples of similar organisations such as regional producing theatres or large-scale opera are also analysed.

Analysis by region
On 1 April 2002 the Arts Council of England and the English Regional Arts Boards joined together to form a single development organisation for the arts in England – Arts Council England. Regional analyses in this report are based on regions as at this date.

Forecast data
The 2003/04 financial figures quoted in this report are, for the most part, forecasts. In many cases data were submitted by organisations before the final audited accounts for the year were produced and figures in published accounts may differ. For this reason, and for reasons of confidentiality, we have, in general, not identified individual arts organisations or their work in this report.

Analysis of income
Income figures are collected under eight headings:
- earned income
- Arts Council England regular funding
- Arts Council England development funding
- lottery revenue funding eg Grants for the arts (GftA)
- lottery stabilisation and recovery funding
- sponsorship, trusts and donations, and lottery revenue partnership funding
- local authority grants
- other public grants

For the purposes of analysis, income figures are merged into four main categories: earned income, Arts Council England subsidy, local authority and other public subsidy, and contributed income. For definitions of the income categories, see Appendix 2.

Lottery income
Some organisations received stabilisation and recovery funding or other revenue funding from programmes such as Grants for the arts (GftA). The number of funded organisations in the survey that received some form of lottery revenue funding was 260, which was 14 fewer than in the 2002/03 survey. In total this funding was £27.6 million, an increase of £1.0 million on 2002/03, based on information for 628 organisations in comparison to the 604 responding in 2002/03. Reference to lottery income is made in the text below for those sectors where this funding is significant.

Analysis of expenditure
Expenditure figures are collected under seven headings:
- artistic programme costs
- lottery revenue project costs
- marketing costs
- education costs
- staff costs
- staff development costs
- overheads and other costs

For the purposes of analysis, expenditure figures are merged into four main categories: artistic programme costs (including lottery revenue project costs), marketing costs, education costs, and overheads, staffing and other costs. For definitions of the expenditure categories, see Appendix 2.

Bar charts to illustrate the percentage composition of income and expenditure over a four-year period (2000/01 to 2003/04) are included in Appendix 8. Percentage figures in the bar charts are based on the full samples in each year of the four-year period and not the constant samples. There may be some small inconsistencies in percentage figures shown on the charts due to rounding up to whole numbers.

Surplus/deficit
Two surplus/deficit figures are shown in the tables:
- the annual surplus/deficit – that is, the difference between income and expenditure for the year
- the accumulated surplus/deficit – that is, the total of the annual surplus/deficit, the balance brought forward from the previous year, and any extraordinary items (income and expenditure not included in the main categories which would otherwise distort the balance sheet, eg sale of premises or assets)

It should be noted that any transfer to or from reserves would affect the accumulated surplus/deficit. Therefore the accumulated surplus/deficit figures shown in the tables are not simply an addition of the annual surplus/deficit to the previous year's accumulated surplus/deficit.

Definitions of attendance figures

Attendance covers attendance at a wide range of arts events – for example, viewing public art work, stopping to see street theatre or attending a theatre performance. Attendance also includes education or training and participatory arts. Sales of books and magazines and radio or television viewing figures are shown in the 'published and broadcast' figures. All types of consumption are therefore covered.

Attendance figures include complimentary tickets distributed as well as tickets sold. Organisations report both actual and estimated figures in the survey – actual attendance figures are derived from records and usually refer to tickets sold; estimated attendance figures are reported where no actual figure exists, usually where entry is free or no reliable record is kept. Where an arts sector reports an increase in actual attendance at the same time as a decrease in estimated attendance, this may be indicative of the introduction of more formal counting of attendances. If there is also an increase in earned income per attendance this may be due to the introduction of more formal charging for attendance.

This report covers total attendance and not the number of attenders. The number of attenders will be lower, as many people attend more than one arts event in any year.[2]

In surveys prior to 1998/1999, organisations were asked to provide figures (actual and estimated) for audiences of radio and television broadcasts. These figures were not always known and data in this area were sometimes inaccurate or incomplete. The 2003/04 survey uses the same approach as in the five previous surveys in that the questionnaire asked the respondent to give the number of broadcasts by time of day and station or channel. These figures were then combined with independent estimates of audience figures to calculate the overall number who would have heard or seen the broadcasts from each organisation. The calculated audience figure is included under the heading 'estimated published

[2] Research based on a survey sample of 25,000 indicates that about one quarter (26%) of all adults attend an arts event more than once a year (Target Group Index 2004/05, conducted by BMRB International). The percentage is the same as in 2003/04.

and broadcast'. As no radio or television audience is now included under the heading 'actual published and broadcast', the actual published and broadcast figure is likely to reduce and the estimated published and broadcast figure to increase.

From comments written on some questionnaires, it is clear that broadcast data is still incomplete and the results do not reflect the full extent of broadcast audiences.

Attendances are divided into four categories, set out in Appendix 3.

Determining subsidy per attendance

Subsidy per attendance is calculated by dividing total Arts Council funding by the total number of attendances (both known and estimated), for performances, exhibitions and workshops. The process is repeated for local authority and other public funding, and also for earned income.

The figure includes complimentary tickets distributed as well as tickets sold. In other reports the Arts Council calculates subsidy per attendance using a tickets-sold figure only and the approach used here has the effect of reducing the subsidy per attendance in some sectors.

Published and broadcast figures (including those relating to live and recorded performances on radio or television) are not used in these calculations. Published and broadcast figures are shown separately. We do not quote a subsidy per attendance ratio for literature or for SUN organisations, as such ratios would not be meaningful.

Contributed income, such as sponsorship, is not included in the local authority and other public subsidy per attendance figures.

There may be some small inconsistencies in these figures due to rounding up to whole numbers.

Structure of the report

Chapter 2 presents data on the full sample and the next six chapters present data specific to each artform. Data provided by the six national companies are presented in Chapter 9 and that for service, umbrella and networking (SUN) organisations in Chapter 10. The remaining chapters deal with touring (Chapter 11), new works (Chapter 12), education, training and participatory arts (Chapter 13), diversity-led arts (Chapter 14 and Chapter 15) and staff and employment

(Chapter 16). Most chapters contain an overview and provide data on: economy; surplus/deficit; performances and exhibition days; attendance; subsidy per attendance; touring and new works.

Appendixes detailing the criteria for the different indicators are provided at the end of the report. There is also a full list of the funded organisations that provided data. Bar charts showing income and expenditure over the four years 2000/2001 to 2003/2004 for all artforms, for individual artforms and for the national companies are set out in Appendix 8.

2 All organisations

Table 1 All organisations full sample

			2003/04
Number of organisations			**628**
		£000s	**%**
Earned income		305,324	43%
Arts Council England subsidy		268,423	38%
Local authority (LA) and other public subsidy		80,670	11%
Contributed income – sponsorship, trusts and donations		60,096	8%
Total income		714,513	100%
Artistic programme costs		275,612	39%
Education costs		25,269	4%
Marketing costs		33,286	5%
Overheads, staffing and other costs		369,958	53%
Total expenditure		704,125	100%
Surplus/deficit		10,388	
Accumulated surplus/deficit		63,336	
		Number	
Performances or exhibition days		126,130	
Performances for young people		9,292	
Attendance		**Actual 000s**	**Estimated 000s**
Exhibitions and performances		23,870	5,876
Workshop-related sessions		2,710	859
Totals		26,580	6,735
Published and broadcast		2,451	171,267
Subsidy per attendance (£)	**Arts Council England**	8.06	
	LA and other public	2.42	
	Total	10.48	
Earned income per attendance (£)		9.16	

Table 2 All organisations constant sample

			2003/04		2002/03
Number of organisations			**524**		**524**
		£000s	**%**	**£000s**	**%**
Earned income		285,335	43%	272,114	44%
Arts Council England subsidy		249,449	38%	230,940	37%
Local authority (LA) and other public subsidy		69,266	10%	63,965	10%
Contributed income – sponsorship, trusts and donations		56,178	9%	58,503	9%
Total income		660,228	100%	625,522	100%
Artistic programme costs		254,810	39%	246,045	40%
Education costs		23,531	4%	21,342	3%
Marketing costs		31,380	5%	31,686	5%
Overheads, staffing and other costs		342,124	52%	321,507	52%
Total expenditure		651,845	100%	620,580	100%
Surplus/deficit		8,383		4,942	
Accumulated surplus/deficit		58,082		37,356	
		Number		**Number**	
Performances or exhibition days		106,803		98,279	
Performances for young people		8,089		7,526	
Attendance		**Actual**	**Estimated**	**Actual**	**Estimated**
		000s	**000s**	**000s**	**000s**
Exhibitions and performances		21,697	4,980	21,030	5,840
Workshop-related sessions		2,458	792	2,026	879
	Totals	24,155	5,772	23,090	6,719
Published and broadcast		2,156	156,512	1,964	134,715
Subsidy per attendance (£)	**Arts Council England**	8.34		7.76	
	LA and other public	2.31		2.15	
	Total	10.65		9.90	
Earned income per attendance (£)		9.53		9.14	

Overview
Table 1 shows data for the full sample of 628 organisations responding to the 2003/04 annual survey of regularly funded organisations.

Table 2 shows data for the constant sample of 524 organisations responding to the annual survey in both 2002/03 and 2003/04.

Chart 1 in Appendix 8 shows how the percentage breakdown of income and expenditure has fluctuated over the past four years. This is based on the data for the full sample for each of the years. Similar charts are provided in Appendix 8 for each of the six main artform sectors and for the national companies.

Economy
In 2002/03, total income for the constant sample of 524 arts organisations increased by £34.7 million (6%) to £660.2 million. There were increases in earned income of £13.2 million (5%), in Arts Council subsidy of £18.5 million (8%) and in local authority and other public subsidy of £5.3 million (8%). Contributed income fell by £2.3 million (4%).

Overall there were 261 recipients of lottery revenue and/or stabilisation and recovery funding, with 215 organisations reporting a total of £8.7 million in lottery revenue funding and 55 organisations receiving £19.0 million in stabilisation and recovery funding. Nine organisations received both types of lottery funding.

All six artforms showed an increase in total income. In percentage terms, combined arts had the largest increase in income (10%) and literature the smallest (1%). In cash terms, theatre had the largest increase (£15.0 million) and literature the smallest (£40,000).

Earned income increased in four sectors and decreased in two. Theatre earned an additional £8.5 million (8%), combined arts £4.0 million (15%), visual arts £2.3 million (13%) and dance £1.3 million (3%). Earned income fell in music by £3.0 million (4%) and in literature by £391,000 (13%).

All artforms reported increases in Arts Council subsidy with percentage increase figures ranging from visual arts with an increase of 3% (£767,000) to literature with 11% (£280,000). In absolute terms the biggest increases were theatre with an additional £7.0 million (9%), music with £5.9 million (9%), dance with £2.2 million (6%) and combined arts with £2.0 million (9%). Five artforms recorded an increase in local authority and other public subsidy, with just literature recording reduced local authority and other public subsidy. Theatre (up £3.3 million – 16%) and music (up £1.8 million – 14%) saw the largest increases in local authority and other public subsidy. The total increase in local authority and other public subsidy of £5.3 million was made up of an increase in local authority subsidy of £1.7 million (4%) and an increase in other public subsidy of £3.7 million (19%).

Total expenditure increased by £31.3 million (5%) to £651.8 million. Overheads, staffing and other costs showed the largest increase at £20.6 million (6%). Artistic programme costs increased by £8.8 million (4%) and education programme costs by £2.2 million (10%). Marketing costs decreased by £306,000 (1%).

The percentage breakdown between the different income streams shows the same percentage in each year of contributed income and local authority and other public subsidy. Overall earned income is 1% lower and Arts Council subsidy is 1% higher. The expenditure breakdown showed a 1% shift from artistic programme costs to education costs with marketing costs and overheads, staffing and other costs retaining the same shares of total expenditure.

Surplus/deficit

The constant sample showed an annual surplus of £8.4 million, which was £3.4 million greater than in 2002/03. The accumulated position for 2003/04 shows a surplus of £58.1 million, a year-on-year increase of more than £20 million. This arises because of over £12 million of ‘extraordinary items’ that have contributed to the accumulated surplus, over-and-above the overall operating surplus for the year.

Performances and exhibition days

The total number of performances and exhibition days increased by 8,524 (9%) to 106,803. This figure includes 8,089 performances for school children, a rise of 563 (7%) on the figure reported for 2002/03.

All artform sectors except dance and music show an increase in the number of performances and exhibition days.

Attendance

In the performance and exhibition category, the actual attendance increased by 667,000 (3%) and the estimated attendance figure fell by 860,000 (15%). Workshop-related sessions saw a rise in actual attendance of 432,000 (21%) while estimated additional attendance decreased by 87,000 (10%). Taking actual and estimated attendances together the attendance at performances and exhibitions decreased by 193,000 (1%) to 26.7 million and the attendance at workshop-related sessions increased by 345,000 (12%) to 3.3 million. The overall picture for total attendance is an increase of 152,000, from 29.8 million in 2002/03 to 29.9 million in 2003/04 (up 1%).

Published and broadcast actual figures increased by 192,000 (10%) to 2.2 million, and the recorded estimated figures increased by almost 22 million (16%) to 157.0 million. A more detailed analysis of workshop-related sessions and attendance is given in the Education section (Chapter 13).

Subsidy per attendance

With both Arts Council subsidy and local authority and other public subsidy increasing by 8% and overall attendance showing a rise of just 1%, both Arts Council subsidy per attendance and local authority and other public subsidy per attendance show similar rises, up by £0.58 (7%) and £0.16 (7%), to £8.34 and £2.31 respectively. Total subsidy per attendance is up £0.75 (8%) at £10.65.

Earned income per attendance rose by £0.39 (4%), moving from £9.14 to £9.53.

Touring

Of the 628 organisations in the full sample, 355 (57%) toured in 2003/04. The total number of all toured performances and exhibition days was 35,617, with 28,537 (80% of the total) reported for England. There were 4,759 performances and exhibition days outside the UK, 13% of the total. A more detailed analysis of touring activity is given in Chapter 11.

The constant sample of all artform organisations had 289 organisations that toured in 2002/03 and 319 in 2003/04. There were 262 organisations that toured in both years.

The total number of toured performances and exhibition days for the constant sample increased from 28,744 in 2002/03 to 31,455 a rise of 9%. One hundred and eighty-five organisations increased their touring, 152 undertook less touring and eight had the same level of touring in both years. One hundred and seventy-nine organisations did not tour in either year. The number of toured performances and exhibition days in England went from 22,912 to 25,084, an increase of 9%. Touring outside England increased from 5,832 to 6,371 a rise of 9%.

New works

A total of 401 (64%) of the full sample of 628 organisations commissioned new works in 2003/04 – 3,357 new works in all. The constant sample reported a small decrease in the number of organisations commissioning new works (354 in 2002/03 and 349 in 2003/04) but with the number of new works commissioned increasing from 2,876 to 2,987. The reported number of artists commissioned was down from 4,299 in 2002/03 to 3,989 in 2003/04.

3 Combined arts

Overview

Data was provided by 98 organisations in this sector compared with 149 in 2002/03 and 136 in 2001/02. There are several factors causing the net decrease in the number of combined arts organisations in the survey.

- Of the 149 combined arts organisations in the 2002/03 survey, 26 are not in the 2003/04 survey and the number of 'new' combined arts organisations, ie ones that were not in the 2002/03 survey, is just 13
- Of the 123 2002/03 combined arts organisations in the 2003/04 survey, 46 have been classified as a different artform in 2003/04 – 15 as theatre, 11 as visual arts, three as music, one as dance and 16 as SUN organisations
- Eight organisations that were not classified as combined arts in 2002/03 (three from theatre, three from visual arts and one each from film, video and broadcasting and multi-media) are now classified as combined arts

The overall effect is a reduction of 51 in the number of combined arts organisations from that seen in the 2002/03 survey.

The remit for the sector is wide and includes the South Bank Centre (one of the six national companies) and multidisciplinary venues (of which 35 responded to the survey – 31 in the constant sample), together with small community arts organisations, performing arts organisations whose work is multi- or interdisciplinary, multidisciplinary festivals, participatory and community arts organisations. Organisations whose primary focus is to provide support for arts and disability or for cultural diversity are classified as support, umbrella and networking (SUN) organisations and are included in Chapter 10.

Figures provided by the South Bank Centre include the concert halls, Voice Box and Poetry Library, but do not include the Hayward Gallery as that is included in the visual arts sector.

Combined arts organisations were asked to provide a percentage breakdown of their activity by artform. All 98 combined arts organisations answered this question and the result was: theatre (22%), music (18%), visual arts (14%), film or media (12%), dance (8%), live or interdisciplinary art (8%), literature (3%), opera or musical theatre (2%) and other activity (13%). Music was referred to most often (by 76 organisations), followed by theatre (by 72 organisations). Although dance makes up just 8% of overall activity it is cited by 71 organisations. Visual arts was mentioned by 66 organisations and film or media by 61.

Table 3 Combined arts full sample

			2003/04
Number of organisations			**98**
		£000s	**%**
Earned income		34,906	44%
Arts Council England subsidy		24,376	31%
Local authority (LA) and other public subsidy		14,796	19%
Contributed income – sponsorship, trusts and donations		4,394	6%
Total income		78,472	100%
Artistic programme costs		24,971	32%
Education costs		4,063	5%
Marketing costs		5,120	7%
Overheads, staffing and other costs		44,188	56%
Total expenditure		78,342	100%
Surplus/deficit		130	
Accumulated surplus/deficit		10,815	
		Number	
Performances or exhibition days		38,647	
Performances for young people		1,115	
Attendance		**Actual 000s**	**Estimated 000s**
Exhibitions and performances		3,500	2,430
Workshop-related sessions		512	336
Totals		4,012	2,766
Published and broadcast		102	43,254
Subsidy per attendance (£)	**Arts Council England**	3.60	
	LA and other public	2.18	
	Total	5.78	
Earned income per attendance (£)		5.15	

In addition to Table 3 showing data for the 2003/04 combined arts full sample, Tables 4, 5, 6 and 7 below show the constant samples of the 85 combined arts organisations, the 31 multidisciplinary venues, 18 interdisciplinary arts organisations and 32 festival and participatory organisations.

Table 4 Combined arts constant sample

			2003/04		**2002/03**
Number of organisations			**85**		**85**
		£000s	**%**	**£000s**	**%**
Earned income		31,402	44%	27,425	42%
Arts Council England subsidy		23,160	33%	21,191	33%
Local authority (LA) and other public subsidy		12,446	17%	12,306	19%
Contributed income – sponsorship, trusts and donations		4,150	6%	3,957	6%
Total income		71,158	100%	64,879	100%
Artistic programme costs		22,664	32%	17,461	27%
Education costs		3,902	5%	2,772	4%
Marketing costs		4,794	7%	3,993	6%
Overheads, staffing and other costs		39,680	56%	39,328	62%
Total expenditure		71,040	100%	63,554	100%
Surplus/deficit		118		1,325	
Accumulated surplus/deficit		10,886		10,648	
		Number		**Number**	
Performances and exhibition days		33,086		26,471	
Attendance		**Actual**	**Estimated**	**Actual**	**Estimated**
		000s	**000s**	**000s**	**000s**
Exhibitions and performances		3,109	2,267	2,714	2,166
Workshop-related sessions		461	331	338	267
	Totals	3,570	2,598	3,052	2,433
Published and broadcast		75	43,254	3	23,074
Subsidy per attendance (£)	**Arts Council England**	3.75		3.86	
	LA and other public	2.02		2.24	
	Total	5.77		6.11	
Earned income per attendance (£)		5.09		5.00	

The constant sample of 85 organisations comprises the South Bank Centre, 31 multidisciplinary venues, 32 festival and participatory organisations, 18 interdisciplinary organisations, and three carnival organisations. The multidisciplinary venues constant sample (Table 5) does not include the South Bank Centre.

Table 5 Multidisciplinary venues constant sample (excludes South Bank Centre)

		2003/04		2002/03
Number of organisations		**31**		**31**
	£000s	**%**	**£000s**	**%**
Earned income	13,743	51%	12,583	50%
Arts Council England subsidy	6,110	22%	5,045	20%
Local authority (LA) and other public subsidy	5,692	21%	6,182	24%
Contributed income – sponsorship, trusts and donations	1,619	6%	1,427	6%
Total income	27,164	100%	25,237	100%
Artistic programme costs	8,088	30%	6,488	26%
Education costs	1,430	5%	1,008	4%
Marketing costs	1,725	6%	1,461	6%
Other costs	15,875	59%	15,748	64%
Total expenditure	27,118	100%	24,705	100%
Surplus/deficit	46		532	
Accumulated surplus/deficit	4,272		4,228	
	Number		**Number**	
Performances and exhibition days	20,093		16,219	
Attendance	**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Exhibitions and performances	1,281	1,029	1,135	862
Workshop-related sessions	200	29	191	51
Totals	1,481	1,058	1,326	913
Published and broadcast	1	2,190	0	2,232
Subsidy per attendance (£) – **Arts Council England**	2.41		2.25	
Subsidy per attendance (£) – **LA and other public**	2.24		2.76	
Subsidy per attendance (£) – **Total**	4.65		5.01	
Earned income per attendance (£)	5.41		5.62	

Economy

Total income for the constant sample of 85 organisations increased by £6.2 million (10%) to £71.2 million in 2003/04. All headings recorded increases: earned income was up by £4.0 million (15%), Arts Council subsidy by £2.0 million (9%), local authority and other public subsidy by £140,000 (1%) and contributed income by £193,000 (5%).

This sector reported that 45 organisations received lottery funding, with 35 organisations reporting a total of £779,000 in revenue funding and 11 organisations receiving £2.5 million in stabilisation and recovery funding. One organisation received investment from both Lottery streams.

Table 6 Interdisciplinary arts constant sample

		2003/04		2002/03	
Number of organisations			**18**		**18**
		£000s	**%**	**£000s**	**%**
Earned income		6,582	53%	5,490	49%
Arts Council England subsidy		2,759	22%	2,534	22%
Local authority (LA) and other public subsidy		2,428	20%	2,158	19%
Contributed income – sponsorship, trusts and donations		656	5%	1,101	10%
Total income		12,425	100%	11,283	100%
Artistic programme costs		5,208	42%	4,428	40%
Education costs		646	5%	558	5%
Marketing costs		837	7%	627	6%
Other costs		5,734	46%	5,496	49%
Total expenditure		12,425	100%	11,109	100%
Surplus/deficit		0		174	
Accumulated surplus/deficit		4,043		4,042	
		Number		**Number**	
Performances and exhibition days		6,290		4,636	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Exhibitions and performances		822	143	634	166
Workshop-related sessions		69	22	32	14
	Totals	891	165	666	180
Published and broadcast		7	7,142	3	1,835
Subsidy per attendance (£)	**Arts Council England**	2.61		3.00	
	LA and other public	2.30		2.55	
	Total	4.91		5.55	
Earned income per attendance (£)		6.23		6.49	

Total expenditure increased by £7.5 million (12%) with rises under each expenditure heading: artistic programme expenditure was up by £5.2 million (30%), education expenditure by £1.1 million (41%), marketing costs by £0.8 million (20%), and overheads, staffing and other costs by £352,000 (1%).

Table 7 Festivals and participatory organisations constant sample

		2003/04		2002/03
Number of organisations		**32**		**32**
	£000s	**%**	**£000s**	**%**
Earned income	3,022	28%	2,706	27%
Arts Council England subsidy	2,630	24%	2,452	24%
Local authority (LA) and other public subsidy	4,265	39%	3,957	39%
Contributed income – sponsorship, trusts and donations	983	9%	976	10%
Total income	10,900	100%	10,091	100%
Artistic programme costs	3,928	37%	3,501	36%
Education costs	1,365	13%	1,009	10%
Marketing costs	384	4%	353	4%
Other costs	5,006	47%	4,864	50%
Total expenditure	10,683	100%	9,727	100%
Surplus/deficit	217		364	
Accumulated surplus/deficit	1,245		905	
	Number		**Number**	
Performances and exhibition days	5,047		4,198	
Attendance	**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Exhibitions and performances	197	398	288	438
Workshop-related sessions	172	77	90	32
Totals	369	475	378	470
Published and broadcast	68	33,922	0	19,007
Subsidy per attendance (£) – **Arts Council England**	3.12		2.89	
Subsidy per attendance (£) – **LA and other public**	5.05		4.67	
Subsidy per attendance (£) – **Total**	8.17		7.56	
Earned income per attendance (£)	3.58		3.19	

Overall, the three groups of combined arts organisations (shown in Tables 5, 6 and 7) each reported similar financial outcomes for the year, although there were some differences. Each saw an increase in total income of between eight and ten per cent and each had a rise in expenditure two per cent over its rise in income. Each had an increase in earned income, 9% for multidisciplinary venues, 20% for interdisciplinary arts and 12% for festivals and participatory organisations. Each had an increase in Arts Council subsidy, by 21%, 9% and 7% respectively. Local authority and other public subsidy increased for interdisciplinary arts (by 13%) and for festivals (by 8%) but fell for multidisciplinary venues (by 8%). Contributed income increased at multidisciplinary venues (13%) and for festivals (1%) but decreased for interdisciplinary arts (by 40%).

All three groups of combined arts organisation reported increased expenditure under every expenditure heading. Artistic programming rose by 25%, 18% and 12% for multidisciplinary venues, interdisciplinary arts and festivals and participatory organisations respectively. Education expenditure increased by 42%, 16% and 35%, marketing costs rose by 18%, 33% and 9% and overheads, staffing and other costs saw rises of 1%, 4% and 3%.

Surplus/deficit

The constant sample of 85 combined arts organisations reported a surplus of £118,000 for 2003/04 compared to £1.3 million in 2002/03. The multidisciplinary venues had a surplus for the year of £46,000 compared to £532,000 in 2002/03. Interdisciplinary arts reported exactly the same total income and expenditure. Festivals and participatory organisations had a surplus of £217,000.

The full sample of combined arts organisations and the constant sample each show an accumulated surplus in excess of £10.8 million. This is distributed across the types of organisation with multidisciplinary venues having an accumulated surplus of £4.3 million, interdisciplinary arts one of £4.0 million and festivals and participatory organisations an accumulated surplus of £1.2 million.

Performances and exhibition days

The constant sample of combined arts organisations reported an increase in performances and exhibition days in 2003/04 of 6,615 (25%) to 33,086. Eight organisations reported increases of 500 or more and one reported a fall of more than 500. All types of combined arts organisation increased their performances and exhibition days: multidisciplinary venues reported the largest increase in performances and exhibition days, up by 3,874 (24%) to 20,093; interdisciplinary arts had an increase of 1,654 (36%) and festivals a rise of 849 (20%). Six of those reporting increases of 500 or more (and the one with a fall of over 500) were multidisciplinary venues.

Attendance
Total attendance increased by 683,000 (12%) for the constant sample. This included increased attendance at performances and exhibitions of 496,000 (10%) and at workshops of 187,000 (31%). The actual known attendance at performances and exhibitions was up by 395,000 (15%) and the estimated additional attendance rose by 101,000 (5%). Actual and estimated attendance at workshop-related sessions each increased by over 20%.

The multidisciplinary venues had a rise of 300,000 in total attendance (13%). Actual attendance at performances or exhibitions rose by 146,000 (13%) and estimated attendance by 167,000 (19%). Known attendance at workshops was up by 9,000 (5%) and estimated attendance fell by 22,000 (43%). Festivals and participatory organisations had very little change in total attendance (down 4,000) but attendance at performances or exhibitions fell by 131,000 (18%) whereas attendance at workshops increased by 127,000 (104%). Interdisciplinary organisations reported 165,000 (21%) more attendances at performances or exhibitions and 45,000 (98%) more attendances at workshop events.

Broadcast figures for the constant sample almost doubled from the 2002/03 level.

Subsidy per attendance
The Arts Council subsidy per attendance for the constant sample decreased to £3.75 (down £0.11 – 3%) in 2003/04 and the local authority and other public subsidy per attendance also decreased, by £0.22 (10%). Total subsidy per attendance fell by £0.34 (6%) to £5.77.

The multidisciplinary venues reported increased Arts Council subsidy per attendance (up £0.16 – 7%) but decreased local authority and other public subsidy per attendance (down £0.52 – 19%). Interdisciplinary organisations had lower levels of both Arts Council subsidy and local authority and other public subsidy per attendance, while festival and participatory organisations saw rises in both subsidy per attendance measures.

Earned income per attendance increased in the constant sample by £0.09 (2%) to £5.09. Multidisciplinary venues showed a decreased earned income per attendance – down £0.21 (4%) to £5.41. Interdisciplinary organisations also reported a fall, down £0.26 (4%), but festivals and participatory organisations saw a rise of £0.39 (12%) to £3.58. The reason there is an overall increase in earned income per attendance when the two major groups of combined arts organisations (multidisciplinary venues and interdisciplinary arts organisations) both reported decreased earned income per attendance, is that the South Bank Centre, which is included in the constant sample but not in the groups, reported an increase of £0.37 (7%) in its earned income per attendance. The South Bank Centre has approximately 25% of all combined arts earned income and attendance in the constant sample.

Touring

Of the 98 organisations in the full sample, 35 (36%) toured in 2003/04. The number of toured performances and exhibition days was 1,844 with 1,578 (86%) in England. The largest amount of touring was in London region (32% of touring in England), then East Midlands (18%) and South West (17%).

The constant sample of combined arts organisations showed a decrease in touring work from 2,144 toured performances and exhibition days in 2002/03 to 1,803 in 2003/04 (down 16%). The number in England went from 2,035 to 1,537 (down 24%). Although the amount of touring was down, the number of organisations undertaking touring increased from 27 to 33. The number of toured performances and exhibition days outside the UK increased from 30 to 199.

The multidisciplinary venues reported a decrease in toured work, from 815 toured performances and exhibition days in 2002/03 (by 11 organisations) to 599 in 2003/04 (also 11 organisations). The interdisciplinary arts organisations had some increase in toured performances and exhibition days, up from 265 to 283, but twice as many organisations undertook touring – six in 2003/04 compared to three in 2002/03. The interdisciplinary organisations increased their toured work outside the UK from seven performances and exhibition days in 2002/03 to 172 in 2003/04 (154 by one organisation). The festivals and participatory organisations undertake over 40% of all touring in combined arts (based on the full sample) and in the constant sample they reported a decrease in toured work, from 1,059 toured performances and exhibition days in 2002/03 (by 12 organisations) to 793 in 2003/04 (by 13 organisations).

New works

The full sample of combined arts organisations commissioned 437 new works in 2003/04 (by 56 organisations). The constant sample reported a decrease from 496 new works in 2002/03 (by 49 organisations) to 432 in 2003/04 (by 54 organisations), a fall of 64 (13%). Forty-one organisations commissioned new works in both years. Overall, 26 commissioned more new work and 28 commissioned less, including those who commissioned none in one or other year.

Both multidisciplinary venues and interdisciplinary arts commissioned fewer new works in 2003/04, down by 34 (26%) to 96 and by 49 (36%) to 86 respectively. Festivals and participatory organisations reported an increase of 26 (14%) to 214 new works commissioned.

4 Dance

Overview

Data was provided by 53 organisations in this sector in 2003/04, three more than in 2002/03. This sample includes a group of five large-scale performing companies (Royal Ballet, Birmingham Royal Ballet, English National Ballet, Northern Ballet Theatre and Rambert Dance Company), and 17 medium and small-scale performing companies. Some of the companies have international profiles and others are funded to tour nationally and regionally. Though the primary purpose of many of the companies is to create and present dance performances, most also provide education work, participatory opportunities, training, facilities and a variety of other dance development initiatives. There are also 31 organisations that promote dance as venues, festivals or agencies.

Table 8 shows data for the 2003/04 dance full sample. Table 9 has data for the constant sample of 47 organisations that responded in both 2002/03 and 2003/04, for comparison. It is then further broken down into tables for the five large-scale performing companies (Table 10), the 16 medium and small-scale performing companies (Table 11) and the 26 dance promoting organisations (Table 12).

Economy

The five large-scale performing companies accounted for 63% of total income in the dance sector. They generated 60% of the sector's earned income, 74% of contributed income and accounted for 67% of total Arts Council dance subsidy and 38% of local authority and other public subsidy. These companies undertook 64% of total expenditure, including 58% of artistic programme costs, 28% of education costs, 53% of marketing expenditure and 70% of other costs.

The dance sector reported £0.8 million of lottery revenue funding (22 organisations) and £1.4 million stabilisation and recovery funding (six organisations).

Total income for the constant sample of 47 organisations increased by £4.3 million (5%) to £88.6 million in 2003/04 with all income streams showing increases. Earned income was up by £1.3 million (3%), Arts Council subsidy increased by £2.2 million (6%), local authority and other public subsidy by £218,000 (6%) and contributed income increased by £549,000 (7%).

Table 8 Dance full sample

			2003/04
Number of organisations			**53**
		£000s	**%**
Earned income		40,035	45%
Arts Council England subsidy		37,551	42%
Local authority (LA) and other public subsidy		3,916	4%
Contributed income – sponsorship, trusts and donations		8,216	9%
Total income		89,718	100%
Artistic programme costs		32,319	36%
Education costs		2,023	2%
Marketing costs		4,707	5%
Overheads, staffing and other costs		49,665	56%
Total expenditure		88,714	100%
Surplus/deficit		1,004	
Accumulated surplus/deficit		5,069	
		Number	
Performances		2,379	
Performances for young people		287	
Attendance		**Actual 000s**	**Estimated 000s**
Performances		1,462	16
Workshop-related sessions		470	63
Totals		1,932	79
Published and broadcast		349	2140
Subsidy per attendance (£)	**Arts Council England**	18.67	
	LA and other public	1.95	
	Total	20.62	
Earned income per attendance (£)		19.91	

Each group of dance organisations had aggregate increases in both earned income and Arts Council subsidy but the increase in local authority and other public subsidy was concentrated in dance promoting organisations (up by £256,000 – 16%). The promoting organisations also reported a large rise in contributed income, up by £730,000 (71%) whereas the large-scale performing companies experienced a decline of £193,000 (3%).

Table 9 Dance constant sample

		2003/04		2002/03
Number of organisations		**47**		**47**
	£000s	**%**	**£000s**	**%**
Earned income	39,648	45%	38,364	45%
Arts Council England subsidy	37,062	42%	34,861	41%
Local authority (LA) and other public subsidy	3,691	4%	3,473	4%
Contributed income – sponsorship, trusts and donations	8,206	9%	7,657	9%
Total income	88,607	100%	84,355	100%
Artistic programme costs	32,127	37%	30,553	37%
Education costs	1,849	2%	1,601	2%
Marketing costs	4,663	5%	4,603	6%
Overheads, staffing and other costs	49,080	56%	46,263	56%
Total expenditure	87,719	100%	83,020	100%
Surplus/deficit	888		1,335	
Accumulated surplus/deficit	4,840		3,840	
	Number		**Number**	
Performances	2,310		2,409	
Attendance	**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances	1,456	15	1,514	28
Workshop-related sessions	441	55	454	65
Totals	1,897	70	1,968	93
Published and broadcast	347	2,140	257	5,320
Subsidy per attendance (£) – **Arts Council England**	18.84		16.91	
Subsidy per attendance (£) – **LA and other public**	1.88		1.69	
Subsidy per attendance (£) – **Total**	20.72		18.60	
Earned income per attendance (£)	20.16		18.61	

Local authority and other public subsidy accounted for 4% of the sector's total income but the dance promoting organisations derived 8% of their income from this source, in both 2002/03 and 2003/04. This might be explained by the fact that more of the dance promoting organisations are building-based and some serve a particular geographical region. Both of these factors contribute to attracting regular local authority funding.

Table 10 Large-scale performing dance companies constant sample

		2003/04		2002/03	
Number of organisations			**5**		**5**
		£000s	**%**	**£000s**	**%**
Earned income		23,973	42%	23,733	43%
Arts Council England subsidy		25,302	45%	24,337	44%
Local authority (LA) and other public subsidy		1,485	3%	1,478	3%
Contributed income – sponsorship, trusts and donations		6,060	11%	6,253	11%
Total income		56,820	100%	55,801	100%
Artistic programme costs		18,888	33%	18,525	34%
Education costs		566	1%	485	1%
Marketing costs		2,505	4%	2,845	5%
Overheads, staffing and other costs		34,724	61%	33,293	60%
Total expenditure		56,683	100%	55,148	100%
Surplus/deficit		137		653	
Accumulated surplus/deficit		2,276		1,989	
		Number		**Number**	
Performances		639		664	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances		761	0	884	0
Workshop-related sessions		54	16	52	16
	Totals	815	16	936	16
Published and broadcast		164	0	142	1,120
Subsidy per attendance (£)	**Arts Council England**	30.45		25.56	
	LA and other public	1.79		1.55	
	Total	32.23		27.12	
Earned income per attendance (£)		28.85		24.93	

For the dance sector overall, total earned income is close to the total subsidy received (£40.0 million and £41.5 million) but there are marked differences between the three dance groups in the relationship between earned income and total subsidy. Overall, earned income is 97% of total subsidy. For large-scale performing, medium-scale performing and dance promoting organisations the earned income as a percentage of total subsidy figures are 89%, 42% and 162% respectively. Another measure of comparison between the sectors is the percentage of total income received from subsidies. Overall it is 46%, for large-scale performing companies it is 48%, for medium-scale performing companies it is 68% and for dance promoting organisations it is 35%.

Table 11 Medium and small-scale performing dance companies constant sample

		2003/04		2002/03	
Number of organisations			**16**		**16**
		£000s	**%**	**£000s**	**%**
Earned income		2,405	28%	1,968	25%
Arts Council England subsidy		5,461	64%	5,134	65%
Local authority (LA) and other public subsidy		317	4%	364	5%
Contributed income – sponsorship, trusts and donations		385	4%	373	5%
Total income		8,568	100%	7,839	100%
Artistic programme costs		2,883	35%	2,566	34%
Education costs		253	3%	248	3%
Marketing costs		559	7%	459	6%
Overheads, staffing and other costs		4,432	55%	4,268	57%
Total expenditure		8,127	100%	7,541	100%
Surplus/deficit		441		298	
Accumulated surplus/deficit		1,183		741	
		Number		**Number**	
Performances		533		555	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Exhibitions and performances		114	6	100	10
Workshop-related sessions		97	4	84	7
		211	10	184	17
Published and broadcast		17	500	17	820
Subsidy per attendance (£)	**Arts Council England**	24.71		25.54	
	LA and other public	1.43		1.81	
	Total	26.14		27.35	
Earned income per attendance (£)		10.88		9.79	

Total expenditure for the constant sample grew by £4.7 million (6%) to £87.7 million in 2003/04. There was an increase of £1.5 million (3%) for the large-scale performing dance companies, an increase of £586,000 (8%) for the medium-scale companies and a rise for the dance promoting organisations of £2.6 million (13%).

Table 12 Dance promoting organisations constant sample

			2003/04		2002/03
Number of organisations			**26**		**26**
		£000s	**%**	**£000s**	**%**
Earned income		13,269	57%	12,663	61%
Arts Council England subsidy		6,299	27%	5,390	26%
Local authority (LA) and other public subsidy		1,888	8%	1,632	8%
Contributed income – sponsorship, trusts and donations		1,761	8%	1,031	5%
Total income		23,217	100%	20,716	100%
Artistic programme costs		10,356	45%	9,462	47%
Education costs		1,030	4%	868	4%
Marketing costs		1,599	7%	1,300	6%
Overheads, staffing and other costs		9,924	43%	8,702	43%
Total expenditure		22,909	100%	20,332	100%
Surplus/deficit		308		384	
Accumulated surplus/deficit		1,381		1,109	
		Number		**Number**	
Performances		1,138		1,190	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances		581	10	530	18
Workshop-related sessions		290	34	318	42
	Totals	871	44	848	60
Published and broadcast		166	1,640	97	3,380
Subsidy per attendance (£)	**Arts Council England**	6.88		5.94	
	LA and other public	2.06		1.80	
	Total	8.95		7.73	
Earned income per attendance (£)		14.50		13.95	

For the constant sample artistic programme costs overall increased by £1.6 million (5%) with increases for all three dance groups. The largest increase was with the dance promoting organisations at £894,000 (9%); large-scale performing rose £363,000 (2%) and medium-scale performing by £317,000 (12%). Overheads, staffing and other costs increased overall by £2.8 million (6%). For large-scale performing these costs rose by £1.4 million (4%), for medium-scale performing by £164,000 (4%) and for the dance promoting organisations by £1.2 million (14%).

Marketing expenditure was down by £340,000 (12%) for large-scale performing, but up by £100,00 (22%) for medium-scale performing and by £299,000 (23%) for dance promoting. The net effect was an increase of £60,000 (1%). All three groups reported increased expenditure on education: large-scale performing up by £81,000 (17%), medium-scale performing by £5,000 (2%) and dance promoting organisations by £162,000 (19%). Overall education costs rose by £248,000 (15%).

Surplus/deficit

The constant sample had a surplus for the year of £888,000 compared with a surplus of £1.3 million in 2002/03. The large-scale performing companies had a reduced surplus for the year, £137,000 compared with £653,000 in 2002/03 whereas the medium-scale performing companies increased their yearly surplus from £298,000 to £441,000 for the year. The large-scale performing companies had an accumulated surplus of £2.3 million and the other two dance groups had surpluses of over £1.0 million. The dance sector as a whole has an accumulated surplus of £5.1 million (full sample). The changes in accumulated surpluses from 2002/03 to 2003/04 are in line with the reported surpluses for 2002/03 and the outturn figures for 2003/04.

Performances

Overall, there was a fall of 99 (4%) in the number of performances in 2003/04 compared with 2002/03 in the constant sample. This was across all three dance groups with each one reporting a four per cent drop in performances.

Attendance

For the constant sample, total attendance decreased by 94,000 (5%) in 2003/04, in line with the reduction in performances. Attendances at performances (actual plus estimated) decreased by 71,000 (5%) and at workshops by 23,000 (4%). The decrease was primarily in actual attendances at performances: down by 58,000 (4%). Each of the other overall attendance figures also fell: estimated attendance at performances by 13,000 (46%); actual attendance at workshops by 13,000 (3%); estimated attendance at workshops by 10,000 (15%).

Across the three dance groups there were different outcomes: large-scale performing actual attendance at performances fell by 123,000 (14%); medium-scale performing companies and dance promoting organisations both reported increased actual attendance at performances, by 14,000 (14%) and 51,000 (10%) respectively.

Subsidy per attendance

With lower attendances and increases in Arts Council and local authority and other public subsidy, Arts Council subsidy per attendance increased by £1.93 (11%) to £18.84, local authority and other public subsidy per attendance went up by £0.19 (11%) to £1.88 and total subsidy per attendance rose by £2.12 to £20.72 (up 11%).

The total subsidy per attendance for large-scale performing companies was £32.23, a rise of £5.11 (19%). For medium-scale performing companies the total subsidy per attendance fell by £1.21 (4%) to £26.14 and for the dance promoting group it was up by £1.22 (16%) at £8.95. It is this relatively low subsidy per attendance coupled with the dance promoting group having the largest share of total attendance (915,000 – 47% of total attendance in the dance sector constant sample) that keeps the overall dance total subsidy per attendance figure at £20.62.

Earned income per attendance was up by £1.55 (8%) to £20.16 for the constant sample. Large-scale performing companies had an increase of £3.92 (16%) to £28.85, medium-scale performing reported a rise of £1.09 (11%) to £10.88 and dance promoting organisations had an increase of £0.55 (4%) to £14.50.

Touring

Of the 53 organisations in the full sample, 35 (66%) toured in 2003/04. The total number of toured performances was 1,157 with 917 (79%) being in England.

The largest amount of toured work in England took place in the South East (16%), the South West (15%) and the East (14%). The five large-scale performing companies undertook 34% of all dance touring.

The constant sample of 47 dance organisations reported more touring in 2003/04, going from 972 performances in 2002/03 to 1,129 in 2003/04 (up 16%). The number of organisations touring increased from 33 to 34.

Touring increased in each dance sector with medium-scale performing companies having the largest increase, from 333 touring performances to 413 (up 24%).

New works

The full sample of dance organisations commissioned 382 new works in 2003/04 (by 38 organisations). This category includes new dance works, events and publications. The constant sample reported an increase from 329 new works commissioned in 2002/03 (by 38 organisations) to 379 in 2003/04 (by 37 organisations). Thirty-five organisations commissioned new works in both years.

5 Theatre

Overview

Data was provided by 174 organisations in this sector in 2003/04 compared with 156 in 2002/03. This sample includes the Royal Shakespeare Company (RSC) and Royal National Theatre (RNT), 63 national touring companies, 57 building-based producing theatres (with theatres varying in size from 200 to 1,000 and more seats, some with additional studio space), 11 presenting theatres, eight regional touring theatres and five theatre festival organisations.

Repertoire ranges from classical to new work and includes musicals. Other activity includes children and young people’s theatre, circus arts, community theatre, mime and physical theatre, puppetry and street arts.

The RSC and RNT cover a wide range of work of different scales, from repertory to touring, while in the producing theatres the majority of work is ‘home-based’ supplemented by touring product.

In addition to Table 13 showing data for the 2003/04 theatre full sample, tables are also provided showing a constant sample of 148 theatre organisations (Table 14), 55 national touring companies (Table 15) and 52 regional producing theatres (Table 16).

The constant sample of 148 organisations comprises the 55 national touring companies, 52 regional producing theatres, eight regional touring companies, six presenting theatres, four festival organisations and 23 other theatre organisations that responded in both 2002/03 and 2003/04. The RNT and RSC are excluded from the constant sample.

Economy

The RSC and RNT accounted for 34% of the total Arts Council subsidy distributed to the full sample of 174 regularly funded theatre organisations. These two companies generated 27% of earned income and 35% of contributed income in the theatre sector. They accounted for 28% of total income, 28% of total expenditure for the sector 6% of all performances and 14% of total attendance.

Theatre organisations responding to the survey reported income of £2.2 million from lottery revenue funding (55 organisations) and £6.3 million from lottery stabilisation and recovery funding (16 organisations).

Table 13 Theatre full sample

			2003/04
Number of organisations			**174**
		£000s	**%**
Earned income		121,428	48%
Arts Council England subsidy		87,570	35%
Local authority (LA) and other public subsidy		26,941	11%
Contributed income – sponsorship, trusts and donations		15,926	6%
Total income		251,865	100%
Artistic programme costs		103,585	42%
Education costs		7,801	3%
Marketing costs		11,018	4%
Overheads, staffing and other costs		123,219	50%
Total expenditure		245,623	100%
Surplus/deficit		6,242	
Accumulated surplus/deficit		20,404	
		Number	
Performances		37,449	
Performances for young people		6,371	
Attendance		**Actual 000s**	**Estimated 000s**
Performances		9,437	1,005
Workshop-related sessions		843	158
Totals		10,280	1,163
Published and broadcast		204	27,695
Subsidy per attendance (£)	**Arts Council England**	7.65	
	LA and other public	2.35	
	Total	10.01	
Earned income per attendance (£)		10.61	

Total income for the constant sample of 148 organisations showed a rise of £12.0 million (8%) to £162.4 million. The increase resulted from the implementation of the Theatre Review, which invested £25 million into the sector between 2002 and 2004. Earned income increased by £3.6 million (5%), Arts Council subsidy rose by £7.3 million (16%) and local authority and other public subsidy was up by £1.4 million (7%). Contributed income reported a fall of £241,000 (3%).

Table 14 Theatre constant sample (excludes RNT and RSC)

		2003/04		2002/03
Number of organisations		**148**		**148**
	£000s	**%**	**£000s**	**%**
Earned income	79,022	49%	75,417	50%
Arts Council England subsidy	52,672	32%	45,404	30%
Local authority (LA) and other public subsidy	21,244	13%	19,861	13%
Contributed income – sponsorship, trusts and donations	9,443	6%	9,684	6%
Total income	162,381	100%	150,366	100%
Artistic programme costs	71,210	45%	67,277	45%
Education costs	5,099	3%	4,675	3%
Marketing costs	7,148	5%	7,802	5%
Overheads, staffing and other costs	74,337	47%	68,515	46%
Total expenditure	157,794	100%	148,269	100%
Surplus/deficit	4,587		2,097	
Accumulated surplus/deficit	9,782		4,923	
	Number		**Number**	
Performances	30,879		30,773	
Performances for young people	5,811		5,932	
Attendance	**Actual**	**Estimated**	**Actual**	**Estimated**
	000s	**000s**	**000s**	**000s**
Performances	7,109	624	7,245	689
Workshop-related sessions	621	124	469	171
	7,730	748	7,714	860
Published and broadcast	183	14,660	40	22,569
Subsidy per attendance (£) – **Arts Council England**	6.21		5.30	
Subsidy per attendance (£) – **LA and other public**	2.51		2.32	
Subsidy per attendance (£) – **Total**	8.72		7.61	
Earned income per attendance (£)	9.32		8.80	

Total expenditure for the constant sample increased by £9.5 million (6%) to £157.8 million in 2003/04. Around 60% of this increase was in overheads, staffing and other costs, which rose by £5.8 million (8%). There were increases of £3.9 million (6%) in artistic programme expenditure and £424,000 (9%) in education costs. Marketing costs were down by £654,000 (8%).

Table 15 National touring companies constant sample

		2003/04		2002/03
Number of organisations		**55**		**55**
	£000s	**%**	**£000s**	**%**
Earned income	6,968	34%	7,388	37%
Arts Council England subsidy	10,731	53%	10,110	51%
Local authority (LA) and other public subsidy	1,766	9%	1,435	7%
Contributed income – sponsorship, trusts and donations	926	5%	1,079	5%
Total income	20,391	100%	20,012	100%
Artistic programme costs	9,568	47%	9,504	50%
Education costs	1,133	6%	633	3%
Marketing costs	869	4%	966	5%
Overheads, staffing and other costs	8,676	43%	7,819	41%
Total expenditure	20,246	100%	18,922	100%
Surplus/deficit	145		1,090	
Accumulated surplus/deficit	2,360		2,224	
	Number		**Number**	
Performances	5,133		5,220	
Attendance	**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances	610	169	672	205
Workshop-related sessions	77	26	83	23
	687	195	755	228
Published and broadcast	6	5,145	12	8,568
Subsidy per attendance (£): Arts Council England	12.17		10.28	
Subsidy per attendance (£): LA and other public	2.00		1.46	
Subsidy per attendance (£): Total	14.17		11.74	
Earned income per attendance (£)	7.90		7.52	

The national touring companies constant sample saw a small increase in total income, up by £379,000 (2%) at £20.4 million. This resulted from falls in earned income (down £420,000 – 6%) and in contributed income (down £153,000 – 14%)

but increases in Arts Council subsidy (up £621,000 – 6%) and in local authority and other public subsidy (up £331,000 – 23%).

Expenditure for the national touring companies grew by £1.3 million (7%) to £20.2 million. Education costs rose by £500,000 (79%) and overheads, staffing and other costs were up by £857,000 (11%). Marketing costs fell by £97,000 (10%) and artistic programme costs increased by £64,000 (1%).

Table 16 Regional producing theatres constant sample

			2003/04		2002/03
Number of organisations			**52**		**52**
		£000s	**%**	**£000s**	**%**
Earned income		60,736	50%	57,653	52%
Arts Council England subsidy		37,348	31%	31,347	28%
Local authority (LA) and other public subsidy		15,778	13%	15,108	14%
Contributed income – sponsorship, trusts and donations		7,466	6%	6,989	6%
Total income		121,328	100%	111,097	100%
Artistic programme costs		52,420	45%	48,921	44%
Education costs		3,198	3%	3,464	3%
Marketing costs		5,224	4%	5,844	5%
Overheads, staffing and other costs		56,328	48%	51,958	47%
Total expenditure		117,170	100%	110,187	100%
Surplus/deficit		4,158		910	
Accumulated surplus/deficit		4,916		481	
		Number		**Number**	
Performances		21,070		20,497	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances		5,680	144	5,671	205
Workshop-related sessions		364	75	319	123
		6,044	219	5,990	328
Published and broadcast		29	2,060	26	1,500
Subsidy per attendance (£)	**Arts Council England**	5.96		4.96	
	LA and other public	2.52		2.39	
	Total	8.48		7.35	
Earned income per attendance (£)		9.70		9.13	

The regional producing theatres sample reported an increase in total income of £10.2 million (9%) to £121.3 million. The largest increase was in Arts Council subsidy, up £6.0 million (19%), since regional producing theatres received a large proportion of the investment from the Theatre Review. Earned income grew by £3.1 million (5%), local authority and other public subsidy increased by £670,000 (4%) and contributed income showed a gain of £477,000 (7%).

Total expenditure for the regional producing theatres sample increased by £7.0 million (6%) compared to 2002/03, with increases in artistic programme costs of £3.5 million (7%) and in overheads, staffing and other costs of £4.4 million (8%). Expenditure on education fell 266,000 (8%) and on marketing by £620,000 (11%).

Surplus/deficit

The constant sample had a surplus for the year of £4.6 million compared to £2.1 million in 2002/03, continuing the improvement in the overall financial position of the sector from the deficit it had in 2001/02. The national touring organisations reported a fall in their surplus from £1.1 million to £145,000 whereas the repertory theatres increased their surplus from £910, 000 in 2002/03 to £4.2 million.

The full sample reported that as a whole the theatre sector had an overall surplus of £6.2 million, with regional producing theatres (including those not in the constant sample) contributing £5.3 million to this.

The accumulated surplus for the theatre sector (full sample) is £20.4 million. This is because the 2002/03 accumulated surplus of £2.3 million plus this year's surplus of £4.8 million are increased by a net £12.8 million in 'extraordinary' items, of which £12.5 million was to the two national companies. The accumulated surplus for the constant sample is £9.8 million.

Performances

The number of performances from the constant sample was 30,879, a slight increase on 2002/03. Out of the 148 in the constant sample, 76 increased the number of performances in 2003/04, three had the same number of performances and 69 put on a reduced number of performances. The national touring organisations reported 87 (2%) fewer performances whilst the regional producing theatres reported an increase of 573 (3%). The constant sample reported 121 (2%) fewer performances for young people, within the performances total. The national touring organisations gave 177 fewer performances for young people and the regional producing theatres gave 191 additional.

Regional producing theatres, which comprise 33% of the full sample, put on 61% of all theatre performances and generated 62% of attendances at performances.

Attendance
The total attendance figure for the constant sample decreased by 96,000 (1%) to 8.5 million. There was an increase in the total (actual plus estimated) attendance at workshop-related sessions of 105,000 (16%).

The national touring organisations reported that overall attendance decreased by 101,000 (10%) to 882,000. Attendance at performances decreased by 98,000 (11%) and attendances at workshop-related sessions fell by 3,000 (3%).

Regional producing theatres saw their total attendance fall by 55,000 (1%) to 6.3 million. The two measures of actual attendance reported increases, at performances by 9,000 (under 1%) and at workshops by 45,000 (14%). The two estimated attendance figures fell, at performances by 61,000 (30%) and at workshops by 48,000 (39%).

Subsidy per attendance
With the increase in subsidy from the Arts Council and local authority and other public sources and the one percent fall in total attendance, the result was a rise in subsidy per attendance. Arts Council subsidy per attendance increased by £0.91 (17%) to £6.21 and local authority and other public subsidy per attendance increased by £0.19 (8%) to £2.51. Total subsidy per attendance was £8.72, up £1.11 (15%) on the 2002/03 figure. Earned income per attendance showed a rise of £0.52 (6%) to £9.32.

The national touring organisations and the regional producing theatres had similar percentage changes to their subsidy per attendance figures, other than the local authority and other public subsidy per attendance at the national touring organisations which increased by £0.54 (37%). This resulted from increased other public subsidy rather than local authority subsidy. Regional producing theatres saw an increase of £0.13 (5%) in local authority and other public subsidy per attendance. Art Council subsidy per attendance increased by £1.89 (18%) to £12.17 for the national touring organisations and by £1.00 (20%) to £5.96 for the regional producing theatres. Total subsidy per attendance increased by £2.43 (21%) to £14.17 for the national touring companies and by £1.13 (15%) to £8.48 for the regional producing theatres. Earned income per attendance increased by £0.38 (5%) to £7.90 for the touring companies and by £0.57 (6%) for the producing theatres.

Although the Arts Council subsidy per attendance figures had similar increases the background to the increases differs between each theatre group. The national touring organisations saw an Arts Council subsidy increase of 6% and a total attendance drop of 10% – giving a subsidy per attendance rise of 18%. The regional producing theatres received an additional 19% of Arts Council subsidy and saw their attendance figure fall by just 1%, the result being a 20% increase in subsidy per attendance.

Touring

Of the 174 organisations in the full sample, 135 (78%) toured in 2003/04. The total number of toured performances was 14,157 with 12,030 (85%) in England. The largest amounts of toured work in England took place in London (24%), the South East (15%) and the South West (14%).

The constant sample of 148 theatre organisations, which excludes RSC and RNT, showed an increase in toured work from 11,431 toured performances in 2002/03 (116 organisations) to 12,252 in 2003/04 (120 organisations) – up 7%. Both the national touring companies and the regional producing theatres reported increased touring. For the national touring companies the 2003/04 total was 5,425 (54 organisations), up by 5%, and for regional producing theatres the total was 4,810 (38 organisations), up by 13%.

New works

The full sample of theatre organisations commissioned 594 new works in 2003/04 (by 135 organisations) including 147 new works by national touring companies (51 organisations) and 222 new works by regional producing theatres (48 organisations). The constant sample reported a higher level of new works commissioned in 2003/04 (488 organisations) compared with 2002/03 (462 organisations) although the number of organisations that reported commissioning new work fell from 119 to 116. Ninety-six organisations commissioned work in both years.

National touring companies in the constant sample reported very similar figures in both years, 106 new works commissioned in 2002/03 by 42 organisations and 104 new works in 2003/04 by 43 organisations. Thirty-four of these commissioned new work in both years.

Regional producing theatres reported an increase from 182 new works in 2002/03 to 196 in 2003/04. The number of organisations commissioning new work fell from 47 to 44. Forty of these commissioned new work in both years.

6 Music

Overview

Data was provided by 85 organisations in this sector, compared with 79 in 2002/03. The sample includes five large-scale opera companies (including the Royal Opera and English National Opera) and 16 orchestras and ensembles. The remaining 64 organisations represent a diverse sample of musical styles and functions including folk and jazz organisations, world music organisations and festivals and sectoral organisations that provide a wide range of support. Many of these organisations have a national or regional touring remit.

The artistic programmes of the whole portfolio of organisations cover opera and orchestral work, jazz, early music, traditional and folk music, experimental and electronic music, and world music.

Table 17 shows data for the 2003/04 music full sample and data for a constant sample of 74 organisations are in Table 18. Table 19 relates to the five large-scale opera companies (Royal Opera, English National Opera, Opera North, Welsh National Opera and Glyndebourne Touring Opera) and Table 20 relates to 16 orchestras[4]. Due to the economies of these sectors, characterised by high fixed overheads, these groups have a major impact on the financial results reported in this chapter. Table 21 shows data for the ‘other’ music organisations.

The constant sample of 74 organisations comprises the five large-scale opera companies, the sixteen regularly funded orchestras and 53 diverse music organisations that responded in both 2002/03 and 2003/04. The home of the English National Opera was closed for six months from July 2003 to January 2004 for refurbishment. This accounts for a reduction of over 50% in the number of performances and attendances, and earned income was down by over 40% (101 performances, 159,000 attendances and £2.8 million earned income).

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[4] The sixteen orchestras included in the analysis are listed in Appendix 7.

Table 17 Music full sample

			2003/04
Number of organisations			**85**
		£000s	**%**
Earned income		77,305	42%
Arts Council England subsidy		71,481	39%
Local authority (LA) and other public subsidy		15,063	8%
Contributed income – sponsorship, trusts and donations		21,453	12%
Total income		185,302	100%
Artistic programme costs		81,406	44%
Education costs		6,220	3%
Marketing costs		7,174	4%
Overheads, marketing and other costs		89,591	49%
Total expenditure		184,391	100%
Surplus/deficit		911	
Accumulated surplus/deficit		11,618	
		Number	
Performances		5,202	
Performances for young people		948	
Attendance		**Actual 000s**	**Estimated 000s**
Performances		2,786	705
Workshop-related sessions		458	154
Totals		3,244	859
Published and broadcast		520	55,242
Subsidy per attendance (£)	**Arts Council England**	17.42	
	LA and other public	3.67	
	Total	21.09	
Earned income per attendance (£)		18.84	

Economy

In 2003/2004 total income for all 85 funded music organisations responding to the survey was £185.3 million. Of this, 49% was generated by the five largest opera companies and a further 34% by the 16 regularly funded orchestras in the survey. These 21 organisations accounted for 85% of all earned income, 86% of all Arts Council subsidy to music, 70% of local authority and other public subsidy and 77%

of contributed income for this sector, as well as 84% of total expenditure and 84% of artistic programme costs (these figures are based on the full sample).

Twenty-four organisations reported lottery revenue funding totalling £0.9 million. Eleven organisations reported lottery stabilisation and recovery funding totalling £7.8 million. Two organisations received investment from both Lottery streams.

Table 18 Music constant sample

			2003/04		2002/03
Number of organisations			**74**		**74**
		£000s	**%**	**£000s**	**%**
Earned income		75,664	42%	78,662	45%
Arts Council England subsidy		70,717	39%	64,772	37%
Local authority (LA) and other public subsidy		14,516	8%	12,704	7%
Contributed income – sponsorship, trusts and donations		20,538	11%	20,423	12%
Total income		181,435	100%	176,561	100%
Artistic programme costs		79,872	44%	79,991	45%
Education costs		5,967	3%	6,054	3%
Marketing costs		6,919	4%	7,617	4%
Overheads, staffing and other costs		87,818	49%	84,560	47%
Total expenditure		180,576	100%	178,222	100%
Surplus/deficit		859		(1,661)	
Accumulated surplus/deficit		11,472		11,378	
Performances		4,154		4,658	
Performances for young people		163		114	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances		2,420	664	2,760	755
Workshop-related sessions		394	138	347	112
		2,814	802	3,107	867
Published and broadcast		475	54,038	477	50,490
Subsidy per attendance (£)	**Arts Council England**	19.56		16.30	
	LA and other public	4.01		3.20	
	Total	23.57		19.50	
Earned income per attendance (£)		20.92		19.79	

In 2003/04 total income for the constant sample of 74 organisations was £181.4 million, an increase of £4.9 million (3%) on 2002/03. There were increases in both Arts Council subsidy (up £5.9 million – 9%) and in local authority and other public subsidy (up £1.8 million – 14%). Earned income decreased by £3.0 million (4%) and contributed income increased by £115,000 (1%).

Table 19 Large-scale opera constant sample

		2003/04		2002/03	
Number of organisations			**5**		**5**
		£000s	**%**	**£000s**	**%**
Earned income		30,483	34%	33,780	39%
Arts Council England subsidy		45,771	50%	39,922	46%
Local authority (LA) and other public subsidy		5,161	6%	4,936	6%
Contributed income – sponsorship, trusts and donations		9,410	10%	8,909	10%
Total income		90,825	100%	87,547	100%
Artistic programme costs		28,894	32%	28,518	31%
Education costs		1,439	2%	1,907	2%
Marketing costs		3,493	4%	3,771	4%
Overheads, staffing and other costs		57,189	63%	56,968	62%
Total expenditure		91,015	100%	91,164	100%
Surplus/deficit		(190)		(3,617)	
Accumulated surplus/deficit		7,479		8,341	
		Number		**Number**	
Performances		664		714	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances		804	7	956	8
Workshop-related sessions		83	18	59	20
		887	25	1,015	28
Published and broadcast		201	3,530	174	3,580
Subsidy per attendance (£)	**Arts Council England**	50.19		38.28	
	LA and other public	5.66		4.73	
	Total	55.85		43.01	
Earned income per attendance (£)		33.42		32.39	

In 2003/04, total expenditure for the constant sample increased by £2.4 million (1%) to £180.6 million. The major change was an increase of £3.3 million (4%) in overheads, staffing and other costs. Marketing expenditure dropped £698,000 (9%), artistic programme costs decreased by £119,000 (under 1%) and education costs fell £87,000 (1%).

Table 20 Orchestras constant sample

		2003/04		2002/03	
Number of organisations			**16**		**16**
		£000s	**%**	**£000s**	**%**
Earned income		35,481	56%	34,734	55%
Arts Council England subsidy		15,724	25%	16,589	26%
Local authority (LA) and other public subsidy		5,335	8%	5,105	8%
Contributed income – sponsorship, trusts and donations		7,054	11%	6,490	10%
Total income		63,594	100%	62,918	100%
Artistic programme costs		39,414	63%	40,612	66%
Education costs		2,004	3%	1,979	3%
Marketing costs		2,197	3%	2,501	4%
Overheads, staffing and other costs		19,431	31%	16,775	27%
Total expenditure		63,046	100%	61,867	100%
Surplus/deficit		548		1,051	
Accumulated surplus/deficit		(283)		(875)	
		Number		**Number**	
Performances		1,596		1,594	
Attendance		**Actual**	**Estimated**	**Actual**	**Estimated**
		000s	**000s**	**000s**	**000s**
Performances		1,154	444	1,133	636
Workshop-related sessions		141	75	183	44
		1,295	519	1,316	680
Published and broadcast		192	15,953	173	13,678
Subsidy per attendance (£)	**Arts Council England**	8.67		8.31	
	LA and other public	2.94		2.56	
	Total	11.61		10.87	
Earned income per attendance (£)		19.56		17.40	

Table 21 Other music organisations constant sample

			2003/04		**2002/03**
Number of organisations			**53**		**53**
		£000s	**%**	**£000s**	**%**
Earned income		9,700	36%	10,148	39%
Arts Council England subsidy		9,222	34%	8,261	32%
Local authority (LA) and other public subsidy		4,019	15%	2,664	10%
Contributed income – sponsorship, trusts and donations		4,074	15%	5,023	19%
Total income		27,015	100%	26,096	100%
Artistic programme costs		11,564	44%	10,861	43%
Education costs		2,524	10%	2,167	9%
Marketing costs		1,229	5%	1,345	5%
Overheads, staffing and other costs		11,197	42%	10,817	43%
Total expenditure		26,514	100%	25,190	100%
Surplus/deficit		501		906	
Accumulated surplus/deficit		4,276		3,912	
		Number		**Number**	
Performances		1,894		2,350	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances		463	213	672	112
Workshop-related sessions		170	46	105	48
		633	259	777	160
Published and broadcast		82	34,555	130	33,232
Subsidy per attendance (£)	**Arts Council England**	10.34		8.82	
	LA and other public	4.51		2.84	
	Total	14.84		11.66	
Earned income per attendance (£)		10.87		10.83	

For large-scale opera companies there was an overall increase in income of £3.3 million (4%) after a rise in Arts Council subsidy of £5.8 million (15%) but a fall in earned income of £3.3 million (10%). The proportion of Arts Council subsidy that was lottery stabilisation and recovery funding rose from 2% to 9%. Contributed income rose by £501,000 (6%) and local authority and other public subsidy[5] increased by £225,000 (5%).

The sixteen regularly funded orchestras covered by Table 20 had an increase in total income of £677,000 (1%). Earned income rose by £747,000 (2%), local authority and other public subsidy increased by £230,000 (5%) and contributed income increased by £564,000 (9%). Arts Council subsidy was down by £865,000 (5%) – although regular funding increased by £934,000 (8%), there was a drop of £1.8 million (37%) in the level of lottery stabilisation and recovery funding reported.

The 53 other music organisations saw total income increase by £919,999 (4%) with Arts Council subsidy up by £961,000 (12%) and local authority and other public subsidy gaining £1.4 million (51%) while earned income fell by £448,000 (4%) and contributed income declined by £949,000 (19%).

Large-scale opera saw an increase in the proportion of income from Arts Council subsidy (from 46% to 50%) and a fall in earned income from 39% to 34% (due in large measure to the fall in earned income at the ENO, a result of its closure for refurbishment). The other music organisations also showed this shift in proportions of income. Orchestras reported an opposite shift from Arts Council subsidy (down from 26% of income to 25%) to earned income (up from 55% of the total to 56%).

Total expenditure decreased slightly for large-scale opera companies, by £149,000 (less than half a percent), increased for orchestras, up £1.2 million (2%), and also for the other music organisations, up £1.3 million (5%).

For large-scale opera artistic programme costs rose by £376,000 (1%), marketing costs were down £278,000 (7%) and overheads, staffing and other costs increased by £221,000 (less than half a percent). Education costs fell by £468,000 (25%), following a large increase in 2002/03.

For the orchestras there was a rise in overheads, staffing and other costs of £2.7 million (16%) and a fall in artistic programme costs of £1.2 million (3%). Marketing costs fell £304,000 (12%) and education costs rose by £25,000 (1%).

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[5] In surveys up to 2001/02, subsidies to the Welsh National Opera from the Arts Council of Wales were included with ‘ACE/RAB subsidy’. For the 2002/03 and 2003/04 surveys these subsidies are reported under ‘local authority and other public subsidy’.

The other music organisations increased artistic programme expenditure by £703,000 (6%) and education expenditure by £357,000 (16%). Overheads, staffing and other costs were up £380,000 (4%) whilst marketing costs fell by £116,000 (9%). Some of these variations may reflect a change in accounting practice.

Surplus/deficit

The full sample reported a surplus of £911,000 in 2003/04 and an accumulated surplus of £11.6 million.

The constant sample had a surplus of £859,000 compared to a deficit of £1.7 million in 2002/03. The accumulated surplus has a small increase of £94,000 at £11.5 million.

The large-scale opera companies had an annual deficit of £190,000 in 2003/04, much reduced from the £3.6 million deficit in 2002/03. Their accumulated surplus stands at £7.5 million.

The 16 regularly funded orchestras reported a surplus for the year of £548,000, 48% down on the 2002/03 surplus of £1.1 million. The accumulated position shows a deficit of £283,000 to be carried forward.

The 53 other music organisations reported a surplus for the year of £501,000, 45% down on the 2002/03 surplus of £906,000. The accumulated position shows a surplus of £4.3 million to be carried forward.

Performances

There were 504 (11%) fewer performances compared to 2002/03; large-scale opera had a decrease of 50 (7%) to 664 (due to ENO’s closure for refurbishment) and orchestras reported an extra two (less than half a percent) giving 1,596. The other music organisations reported 456 fewer performances (19%).

The music sector as a whole reported 948 performances for young people, more than three times that reported in 2002/03. One organisation that was not in the 2002/03 survey, and therefore not in the constant sample, had 553 schools performances in 2003/04.

Attendance

Total attendance for the constant sample of music organisations was 3.6 million, down 358,000 (9%) on 2002/03. The total attendance at performances (excluding workshop-related sessions) for the constant sample was down by 431,000 (12%)

at 3.1 million, while the attendance at workshop-related sessions was up by 73,000 (16%) at 532,000.

Large-scale opera had 153,000 (16%) fewer attendances at performances (excluding workshop-related sessions) at 811,000. This decrease is almost entirely in the known attendance (rather than the estimated) and is very close to the reported fall in performance attendance at the English National Opera (down 159,000 and due, as aforementioned, to the closure for refurbishment). Orchestras reported a decrease of 171,000 (10%) to 1.6 million in their performance audience.

Large-scale opera recorded higher attendance at workshop-related sessions, up 22,000 (28%) and orchestras recorded a fall of 11,000 (5%).

The music sector regularly produces high estimated figures in the published and broadcast category, due to live and recorded broadcasts on radio and television. In the constant sample, the 2003/04 broadcast audience figure was 54.0 million, up 3.5 million from 2002/03 (7%).

Subsidy per attendance

With total attendance down by 23% and rises in both Art Council subsidy (up 9%) and local authority and other public subsidy (up 14%) there are substantial increases in the subsidy per attendance indicators. Arts Council subsidy per attendance for the 74 constant sample organisations was up £3.26 (20%) at £19.56 and local authority and other public subsidy per attendance increased by £0.81 (25%) to £4.01. Total subsidy per attendance rose £4.07 (21%) to £23.57.

For large-scale opera, Arts Council subsidy per attendance rose by £11.91 (31%) to £50.19 while local authority and other public subsidy gained £0.93 (20%) to £5.66. This also is the result of increased subsidies and decreased attendance, reflecting fewer performances by ENO during refurbishment. Overall total subsidy per attendance was up by £12.84 (30%) at £55.85.

Orchestras experienced a decrease of 5% in Arts Council subsidy (due to lower levels of lottery stabilisation and recovery funding being reported) and a fall of 9% in total attendance figures, leading to a small increase in Arts Council subsidy per attendance of £0.36 (4%) at £8.67. Local authority and other public subsidy per attendance to these orchestras was up by £0.38 (15%) to £2.94, resulting in a total subsidy per attendance figure of £11.61, up by £0.74 (7%) on 2002/03. The other music organisations recorded an overall increase of £3.18 (27%) in subsidy per attendance with Arts Council subsidy up by £1.52 (17%) and local authority and other public subsidy up by £1.67 (59%).

The music sector constant sample earned income per attendance was up by £1.13 (6%) to £20.92. Large-scale opera earned income per attendance increased by £1.03 (3%) to £33.42. For orchestras the rise was £2.16 (12%) to £19.56 while the other music organisations reported little change at £10.87.

Touring

Of the 85 music organisations in the full sample, 52 (61%) carried out some level of touring in 2003/04. The total number of toured performances was 3,529 with 3,078 (87%) being in England. The South East has the most music toured performances (26% of toured performances in England) – perhaps reflecting the small number of resident music organisations in the region – followed by London (18%) and the South West (15%).

The constant sample recorded an increase in toured performances from 2,736 in 2002/03 (46 organisations) to 2,972 in 2003/04 (51 organisations) – up by 9%.

Three of the large-scale opera companies in the survey undertook touring work with the opera companies giving 293 performances (279 in England). This is 57 (19%) higher than in 2002/03 and is primarily because Opera North reported 93 more toured performances in 2003/04 due to a season of double-bill operas.

All 16 of the regularly funded orchestras in the survey undertook touring in 2003/04, putting on 1,212 performances in total (962 in England). This was up from 1,176 in 2002/03 (924 in England).

Just over half of the other music organisations toured in 2003/04 – 33 out of 64 (52%). They reported 2,024 performances with 1,837 in England.

The large-scale opera companies and the sixteen orchestras together undertook 43% of all music touring performances (by the full sample) – up from 37% in 2002/03.

New works

The full sample of music organisations commissioned 325 new works in 2003/04 (by 43 organisations). Large-scale opera companies reported 31 new works commissioned (by three companies) and the orchestras 23 (by 13 orchestras). The constant sample reported a decrease from 346 new works commissioned in

2002/03 to 321 in 2003/04 with the number of organisations commissioning new works falling from 44 to 40. The figure of 31 new works commissioned for large-scale opera companies (by three companies) compares with 30 in 2002/03 (by four companies). The orchestra figure of 23 is a decrease on the 45 reported in 2002/03, also by 13 orchestras.

The other music organisations commissioned 271 new works in 2003/04 (by 27 organisations). This is over 80% of all new work commissioned in the music sector.

7 Literature

Overview
This report is concerned with those organisations receiving Arts Council funding and does not cover the much wider commercial literature sector which can be measured by book and magazine sales, nor does it cover book loans through public libraries and so on.

The 35 organisations representing this sector (one fewer than in 2002/03) cover independent literary presses, magazines, festivals and organisations involved mainly in literature development; 34 of them receive subsidy of £25,000 or more from the Arts Council.

Activity across the organisations is broadly divided into three categories, with the work of most covering more than one category:
- the sale of books and magazines
- literary events (eg readings, workshops, festivals etc)
- promotional support and professional development for publishers, writers etc

Table 22 shows data for the full 2003/04 literature sample. For comparison, Table 23 shows data for a constant sample of 31 organisations submitting returns in both 2002/03 and 2003/04.

In 2003/04 total income for all 35 literature organisations responding to the survey was £7.7 million. Six organisations generate £4.1 million of this (53%).

The results for Literature organisations, in both the full sample and constant sample tables, have some differences to those seen in the 2002/03 report. This is primarily because the largest single organisation in the 2002/03 analysis, with over 25% of total income and a large actual published figure, is not included in the 2003/04 survey.

Table 22 Literature full sample

		2003/04
Number of organisations		**35**
	£000s	**%**
Earned income	2,619	34%
Arts Council England subsidy	3,095	40%
Local authority (LA) and other public subsidy	1,127	15%
Contributed income – sponsorship, trusts and donations	893	12%
Total income	7,734	100%
Artistic programme costs	2,466	32%
Education costs	1,306	17%
Marketing costs	375	5%
Overheads, staffing and other costs	3,453	45%
Total expenditure	7,600	100%
Surplus/deficit	134	
Accumulated surplus/deficit	589	
	Number	
Performances and readings	1,240	
Attendance	**Actual 000s**	**Estimated 000s**
Performances and readings	52	1
Workshop-related sessions	116	43
Totals	168	44
Published and broadcast	531	22,713

Economy

In 2003/2004 total income for the constant sample of 31 literature organisations increased by £40,000 (1%) while total expenditure increased by £756,000 (12%).

Eight organisations reported receiving a total of £149,000 in lottery revenue funding and one of these also received £8,000 of lottery stabilisation and recovery funding.

Earned income was down by £391,000 (13%) and local authority and other public subsidy fell £127,000 (11%). Arts Council subsidy increased by £280,000 (11%) and contributed income rose by £278,000 (47%).

The 2002/03 report showed that the trend in year-on-year increases in local authority and other public subsidy for the literature sector, first noted in the 2001/02 report, had continued into 2002/03. The 2003/04 figures do not continue this trend. The level of local authority and other public subsidy, in both the full sample and the constant sample is approximately £1 million below the levels shown in the 2002/03 report. This is because a major recipient of local authority and other public subsidy in the 2002/03 survey (Book Trust with £870,000 of other public subsidy) is not in the 2003/04 survey.

Table 23 Literature constant sample

		2003/04		2002/03
Number of organisations		**31**		**31**
	£000s	**%**	**£000s**	**%**
Earned income	2,566	35%	2,957	40%
Arts Council England subsidy	2,868	39%	2,588	35%
Local authority (LA) and other public subsidy	1,079	15%	1,206	16%
Contributed income – sponsorship, trusts and donations	865	12%	587	8%
Total income	7,378	100%	7,338	100%
Artistic programme costs	2,318	32%	2,609	40%
Education costs	1,302	18%	811	12%
Marketing costs	354	5%	352	5%
Overheads, staffing and other costs	3,315	45%	2,761	42%
Total expenditure	7,289	100%	6,533	100%
Surplus/deficit	89		805	
Accumulated surplus/deficit	533		455	
Performances or readings	1,175		910	
Attendance	**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances or readings	46	1	30	2
Workshop-related sessions	115	42	152	33
Totals	161	43	182	35
Published and broadcast	527	22,631	672	6,618

Surplus/deficit

In 2003/04 the constant sample had an annual surplus of £89,000, compared to a surplus of £805,000 for 2002/03. The accumulated surplus was £533,000.

Performances and readings
The full sample reported a total of 1,240 performances and readings with 559 of these (45%) for young people. The constant sample had a year-on-year increase in performances and readings of 265 (29%).

Attendance
The performance attendance figures can broadly be related to readings, while the actual publication and broadcast category relates to sales of books and magazines.

Actual performance and readings attendance rose from 30,000 in 2002/03 to 46,000 in 2003/04 – up 16,000 (53%). There was very little additional estimated attendance at performances and readings, no more than 2,000 in either year. For workshop-related attendance (which is predominantly formal education work with the 4-19 age group), the actual attendance fell from 152,000 to 115,000 – down 37,000 (24%). This fall is because of one organisation that reported 69,200 for the 'aged 4-19 in formal education' category in 2003/04 compared to 116,000 in 2002/03 under this heading. Estimated attendance increased by 9,000 (27%) to 42,000. The overall attendance result was a reported decrease of 13,000 (6%) giving a total attendance of 204,000.

The actual published figure for 2003/04 is 527,000 compared with 672,000 in 2002/03, a fall of 145,000 (22%). The estimated broadcast audience is 22.6 million compared with 6.6 million in 2002/03, largely because one organisation that reported no broadcast audience in 2002/03 had almost 16 million in 2003/04.

Touring
Of the 35 literature organisations in the full sample, 13 (37%) toured in 2003/04. The total number of toured performances and exhibition days (readings) was 194 with 173 (89%) in England. All regions except the East had some touring. London had 57% of the total toured work followed by the North East (22%). The constant sample saw an increase in toured performances and exhibition days from 178 (10 organisations) to 194 (13 organisations).

New works
The full sample of literature organisations commissioned 376 new works in 2003/04 (by 19 organisations), while the constant sample saw an increase from 167 (by 14 organisations) to 372 (by 17 organisations). Eleven organisations reported commissioning new works in both years.The 2002/03 report showed that the trend in year-on-year increases in local authority and other public subsidy for

8 Visual arts

Overview

The 136 organisations representing this sector (up from 99 in the 2002/03 survey) cover galleries and exhibition-based organisations (including independent galleries, local authority run museums and galleries, and the Hayward Gallery at the South Bank Centre), commissioning agencies, development and producing agencies, and support organisations involved in promotional activity and providing a variety of support. Film, video and broadcasting organisations are no longer reported on separately and are included in the overall visual arts tables.

Contemporary visual arts includes a broad range of practice, from painting and sculpture to installation, photography and new media, moving image, live art, craft, architecture and design.

Table 24 shows data for the full 2003/04 visual arts sample. For comparison, Table 25 shows data for a constant sample of 102 organisations, which includes the Hayward Gallery plus the 46 art galleries and venues, and 55 visual arts producing and development agencies or publishers that reported in 2002/03 and 2003/04. The Hayward Gallery was closed between January and October 2003 to allow development of a new foyer area and its attendance figures for 2003/04 decreased overall by 321,000 (37%) from those reported for 2002/03.

Table 26 shows data for a constant sample of 46 art galleries and venues, not including the Hayward Gallery, and Table 27 shows data for a constant sample of 55 producing and development agencies or publishers.

Comparing the distribution of income for the full visual arts sector with the other artforms, visual arts, which generally does not have box office income, has the lowest contribution from earned income (29%) and the highest level of total subsidy ie Arts Council plus local authority and other public subsidy (61%). However, earned income increased by 13% between 2002/03 and 2003/04 for the constant sample of 102 organisations.

Economy

Total income for the constant sample of 102 visual arts organisations increased by £3.7 million (6%) to £68.6 million in 2003/04. There were increases of £2.3 million (13%) in earned income, £767,000 (3%) in Arts Council subsidy, £151,000 (1%) in local authority and other public subsidy and £472,000 (8%) in contributed income.

Fifty-seven visual arts organisations received a total of £3.4 million under lottery revenue funding and eight organisations received a total of £620,000 in stabilisation and recovery funding.

Table 24 Visual arts full sample

			2003/04
Number of organisations			**136**
		£000s	**%**
Earned income		22,807	29%
Arts Council England subsidy		32,554	42%
Local authority (LA) and other public subsidy		14,689	19%
Contributed income – sponsorship, trusts and donations		7,800	10%
Total income		77,850	100%
Artistic programme costs		21,675	29%
Education costs		2,790	4%
Marketing costs		4,530	6%
Overheads, staffing and other costs		46,794	62%
Total expenditure		75,789	100%
Surplus/deficit		2,061	
Accumulated surplus/deficit		11,526	
		Number	
Exhibition days		39,725	
Attendance		**Actual 000s**	**Estimated 000s**
Exhibitions		6,590	1,653
Workshop-related sessions		252	96
Totals		6,842	1,749
Published and broadcast		687	20,223
Subsidy per attendance (£)	**Arts Council England**	3.79	
	LA and other public	1.71	
	Total	5.50	
Earned income per attendance (£)		2.65	

Expenditure of the constant sample increased by £3.3 million (5%) to £66.8 million in 2003/04. The major changes were an increase in overheads, staffing and other costs of £4.0 million (11%) and a reduction in artistic programme expenditure of £1.1 million (6%). Expenditure on education increased by £177,000 (8%) and on marketing by £254,000 (6%).

Table 25 Visual arts constant sample

		2003/04		2002/03
Number of organisations		**102**		**102**
	£000s	**%**	**£000s**	**%**
Earned income	21,021	31%	18,672	29%
Arts Council England subsidy	29,241	43%	28,474	44%
Local authority (LA) and other public subsidy	12,062	18%	11,911	18%
Contributed income – sponsorship, trusts and donations	6,295	9%	5,823	9%
Total income	68,619	100%	64,880	100%
Artistic programme costs	18,810	28%	19,914	31%
Education costs	2,344	4%	2,167	3%
Marketing costs	4,177	6%	3,923	6%
Overheads, staffing and other costs	41,507	62%	37,512	59%
Total expenditure	66,838	100%	63,516	100%
Surplus/deficit	1,781		1,364	
Accumulated surplus/deficit	9,540		7,666	
	Number		**Number**	
Exhibition days	31,601		29,712	
Attendance	**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Exhibitions	6,071	1,331	5,522	2,197
Workshop-related sessions	206	89	173	77
	6,277	1,420	5,695	2,274
Published and broadcast	491	19,788	372	25,644
Subsidy per attendance (£): Arts Council England	3.80		3.57	
Subsidy per attendance (£): LA and other public	1.57		1.49	
Subsidy per attendance (£): Total	5.37		5.07	
Earned income per attendance (£)	2.73		2.34	

In 2003/04 the total income of the art galleries and venues constant sample, which excludes the Hayward Gallery, was up £1.5 million (5%) at £35.5 million. Earned income increased by £1.9 million (23%) and Arts Council subsidy rose by £568,000 (4%). Local authority and other public subsidy fell by £374,000 (4%) and contributed income declined by £556,000 (14%).

Table 26 Art galleries and venues constant sample (excludes Hayward Gallery)

			2003/04		2002/03
Number of organisations			**46**		**46**
		£000s	**%**	**£000s**	**%**
Earned income		10,106	28%	8,213	24%
Arts Council England subsidy		13,908	39%	13,340	39%
Local authority (LA) and other public subsidy		8,139	23%	8,513	25%
Contributed income – sponsorship, trusts and donations		3,355	9%	3,911	12%
Total income		35,508	100%	33,977	100%
Artistic programme costs		7,408	21%	7,685	23%
Education costs		1,078	3%	1,139	3%
Marketing costs		1,949	6%	1,993	6%
Overheads, staffing and other costs		24,152	70%	22,701	68%
Total expenditure		34,587	100%	33,518	100%
Surplus/deficit		921		459	
Accumulated surplus/deficit		4,058		3,290	
		Number		**Number**	
Exhibition days		22,767		19,761	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Exhibitions		4,980	880	4,361	1,460
Workshop-related sessions		159	37	140	29
		5,139	917	4,501	1,489
Published and broadcast		300	11,789	75	21,024
Subsidy per attendance (£)	**Arts Council England**	2.30		2.23	
	LA and other public	1.34		1.42	
	Total	3.64		3.65	
Earned income per attendance (£)		1.67		1.37	

The art galleries and venues constant sample reported an expenditure rise of £1.1 million (3%) with other costs up £1.5 million (6%) and falls in the other three expenditure headings: artistic programme costs down £277,000 (4%), education costs down £61,000 (5%) and marketing costs decreased £44,000 (2%).

Table 27 Visual arts producing and development organisations constant sample

		2003/04		2002/03
Number of organisations		**55**		**55**
	£000s	**%**	**£000s**	**%**
Earned income	7,316	31%	7,505	33%
Arts Council England subsidy	10,143	42%	10,180	45%
Local authority (LA) and other public subsidy	3,923	16%	3,398	15%
Contributed income – sponsorship, trusts and donations	2,542	11%	1,772	8%
Total income	23,924	100%	22,855	100%
Artistic programme costs	8,993	39%	9,590	43%
Education costs	1,059	5%	857	4%
Marketing costs	1,402	6%	1,234	6%
Overheads, staffing and other costs	11,574	50%	10,452	47%
Total expenditure	23,028	100%	22,133	100%
Surplus/deficit	896		722	
Accumulated surplus/deficit	4,873		3,732	
	Number		**Number**	
Exhibition days	8,468		9,636	
Attendance	**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Exhibitions	720	318	623	446
Workshop-related sessions	44	16	29	18
	764	334	652	464
Published and broadcast	183	7,999	289	4,620

The total income of the producing and developing agencies and publishers sample increased by £1.1 million (5%) to £23.9 million. There were large increases in contributed income (up £770,000 – 43%) and in local authority and other public subsidy (up £525,000 – 15%), and smaller falls in earned income (down £189,000 – 3%) and in Arts Council subsidy (down £37,000 – under 1%).

Expenditure of the producing and developing agencies and publishers increased by £895,000 (4%) to £23.0 million in 2003/04. The major changes were an increase in overheads, staffing and other costs of £1.1 million (11%) and a reduction in artistic programme expenditure of £597,000 (6%). Expenditure on education increased by £202,000 (24%) and on marketing by £168,000 (14%).

Surplus/deficit

The constant sample showed an annual surplus of £1.8 million in 2003/04 compared with £1.4 million in 2002/03. The art galleries and venues (excluding the Hayward Gallery) reported an increased annual surplus, up from £459,000 to £921,000 and the producing and developing agencies saw their surplus increase from £722,000 to £896,000.

Each of the visual arts constant sample, the art galleries and venues and the producing and developing agencies report increased accumulated surpluses.

Exhibition days

The constant sample reported 31,601 exhibition days in 2003/04, 1,889 (6%) higher than in 2002/03. The number of exhibition days reported by the art galleries and venues increased by 3,006 (15%) to 22,767 whereas the producing and developing agencies saw a fall of 1,168 (12%) to 8,468.

Attendance

Although overall attendance for the constant sample was down by 272,000 (3%) at 7.7 million the actual known attendance figures increased for both exhibitions and at workshops. Actual attendance at exhibitions rose by 549,000 (10%) and at workshop-related sessions by 33,000 (19%). Estimated attendance recorded a fall of 866,000 (39%) at exhibitions and a rise of 12,000 (16%) at workshops.

The art galleries constant sample reported a small increase in overall attendance of 66,000 (1%). Actual attendance at exhibitions was up by 619,000 (14%) and estimated attendance was down by 580,000 (40%). Both actual and estimated attendance at workshops increased – by 27,000 (16%) in all.

The producing and developing agencies reported a small decrease in overall attendance of 18,000 (2%). Actual attendance at exhibitions was up by 97,000 (16%) and estimated attendance down by 128,000 (29%). Attendance at workshops increased by 13,000 (28%).

The known published figures for the constant sample was higher at 491,000 compared with 372,000 in 2002/03, but the estimated broadcast audience declined to 20 million. This is a mixture of radio and television broadcasts with additional figures covering internet access to the websites of visual arts organisations. Changes in figure may be due to differences in reporting as well as in activity.

Subsidy per attendance
For the constant sample of 102 organisations, total subsidy per attendance increased by £0.30 (6%) to £5.37, with Arts Council subsidy rising £0.23 (6%) and local authority and other public subsidy up by £0.08 (5%). Earned income per attendance increased by £0.39 (17%) to £2.73 in 2003/04.

For art galleries and venues, total subsidy per attendance fell by £0.01 to £3.64, with Arts Council subsidy per attendance up £0.07 (3%) but local authority and other public subsidy per attendance down £0.08 (6%). Earned income per attendance for art galleries and venues increased by £0.30 (22%) to £1.67.

Touring
Of the 136 visual arts organisations in the full sample, 77 (57%) toured in 2003/04. The total number of toured exhibition days was 14,418, with 10,518 (73%) in England. All regions were covered with London seeing the most toured work (23% of the total in England), followed by South East (15%) and East (12%).

Thirty-nine (66%) of the galleries and venues undertook touring and 38 (50%) of the producing and developing agencies. The galleries and venues had 8,457 touring exhibition days, 6,314 (75%) in England and the producing and development agencies reported 5,961 exhibition days touring, 4,204 (71%) in England.

New works
The full sample of visual arts organisations commissioned 1,129 new works (by 94 organisations) in 2003/04, with the constant sample seeing a fall from 994 (by 80 organisations) to 867 (by 72 organisations).

Art galleries and venues commissioned fewer new works in 2003/04, down from 484 (42 organisations) to 386 (35 organisations). The producing and developing agencies also commissioned less, down from 508 (37 organisations) to 478 (36 organisations).

9 National companies

Overview

The six national companies – the Royal Opera House (including Royal Ballet), English National Opera, Birmingham Royal Ballet, South Bank Centre (including Hayward Gallery and Royal Festival Hall), Royal National Theatre and Royal Shakespeare Company – have a major impact on the whole subsidised sector, with activity covering music, opera, ballet, theatre, visual arts and combined arts.

Figures for these companies have already been included in previous sections of this report. However, because of the national companies' importance to the whole arts economy, this section provides additional analysis of data provided by these six companies in relation to the data provided by the full sample of 628 funded organisations making returns in 2003/04.

The closure and re-opening of principal venues will influence the overall patterns of expenditure, income and audiences exhibited by the national companies as a whole. The English National Opera was closed for six months from July 2003 to January 2004 and with its number of performances and attendances reduced by over 50% the earned income was down by over 40%. The Hayward Gallery was closed between January and October 2003 to allow development of a new foyer area and its attendance figures decreased by almost 40%.

The figures in this report do not include any capital funding that the national companies may have received from the lottery or other sources.

Economy

In 2003/04 the six national companies generated 28% of total income and 29% of total expenditure of the 628 funded organisations in the survey – the same overall figures as in the 2002/03 survey. They received £93.3 million in Arts Council subsidy, accounting for 35% of the £268.4 million total Arts Council subsidy distributed to the funded organisations that responded to the 2003/04 survey. This compares with their receipt of 36% (£87.4 million) of total Arts Council England subsidy in the 2002/03 survey and 37% (£80.6 million) of total Arts Council England subsidy in the 2001/02 survey.

In the context of the 628 organisations in the survey, the national companies:

- generated 28% (£85.8 million) of the total earned income
- generated 32% (£19.2 million) of total contributed income
- received 4% (£3.1 million) of total local authority and other public subsidy

Table 28 National companies

		2003/04		2002/03	
Number of organisations			**6**		**6**
		£000s	**%**	**£000s**	**%**
Earned income		85,786	43%	79,739	42%
Arts Council England subsidy		93,285	46%	87,405	46%
Local authority (LA) and other public subsidy		3,136	2%	1,240	1%
Contributed income – sponsorship, trusts and donations		19,246	10%	21,929	12%
Total income		201,453	100%	190,313	100%
Artistic programme costs		60,641	30%	58,569	30%
Education costs		3,828	2%	3,761	2%
Marketing costs		9,043	4%	9,388	5%
Overheads, staffing and other costs		127,671	63%	121,239	63%
Total expenditure		201,183	100%	192,957	100%
Surplus/deficit		270		(2,644)	
Accumulated surplus/deficit		20,732		1,235	
		Number		**Number**	
Performances and exhibition days		4,896		4,755	
Attendance		**Actual 000s**	**Estimated 000s**	**Actual 000s**	**Estimated 000s**
Performances and exhibitions		3,497	585	3,454	741
Workshop-related sessions		237	275	132	369
		3,734	860	3,586	1,110
Published and broadcast		383	2,300	324	3,490
Subsidy per attendance (£)	**Arts Council England**	20.31		18.61	
	LA and other public	0.68		0.26	
	Total	20.99		18.88	
Earned income per attendance (£)		18.67		16.98	

Total income for the national companies increased by £11.1 million (6%) to £201.5 million with increases in earned income of £6.0 million (8%) and in Arts Council subsidy of £5.9 million (7%). Local authority and other public subsidy increased by £1.9 million overall (153%) with one company (Royal National Theatre) receiving close to £2.0 million of other public subsidy. Contributed income decreased with both the Royal National Theatre and the Royal Shakespeare

Company reporting falls of over £1.5 million. In contrast the South Bank raised an additional £695,000 (118%) of contributed income and the Birmingham Royal Ballet increased its contributed income by £642,000 (270%). The aggregate picture for the national companies together was a fall of £2.7 million (12%), the first year since 1998/99 that contributed income has shown a year-on-year fall for the national companies.

Total expenditure in 2003/04 increased by £8.2 million (4%) to £201.2 million. The largest increase was in overheads, staffing and other costs, up £6.4 million (5%). Other increases were in artistic programme expenditure of £2.1 million (4%) and in education costs of £67,000 (2%). Marketing costs declined by £345,000 (4%).

Of the six national companies, four reported increased total income and expenditure in 2003/04, one reported decreased income and expenditure for the year and one had increased income and decreased expenditure.

Surplus/deficit

The 2003/04 overall outcome was a surplus of £270,000 compared to an overall deficit of £2.6 million in 2002/03. Two companies had financial surpluses for the year and four had deficits.

There was an accumulated surplus to be carried forward of £20.7 million. This compares to a reported accumulated surplus for 2002/03 of just £1.2 million. This increase arises because of over £12.5 million in extraordinary items plus a reported brought-forward surplus of £7.9 million rather than the £1.2 million reported in 2002/03. One company reported its brought-forward surplus as £6.6 million larger than its reported carry-forward surplus for 2002/03.

Performances

The national companies reported 4,896 performances and exhibition days in 2003/04, 141 (3%) more than in the previous year. English National Opera had over 100 fewer performances than in 2002/03 because of the six months closure. The Royal National Theatre reported 166 fewer performances but this did not affect its attendance figures, which grew by 29%.

Attendances

Total attendance at performances and exhibition days and workshop-related sessions for the national companies amounted to 4.6 million, down by 102,000 (2%) on 2002/03. The figures reported by national companies showed actual attendance figures at performances and exhibitions increased by 43,000 (1%) and estimated attendance figures dropped by 156,000 (21%). The net result was a 113,000 (3%) fall in attendance at performances and exhibitions. The two companies with closures – the South Bank (Hayward Gallery closed) and the English National Opera – both had decreases of over 150,000 in attendance at performances and exhibitions.

Actual attendance at workshop-related sessions increased by 105,000 (80%) whilst estimated attendance fell by 94,000 (25%), giving a total workshop-related attendance of 512,000 up by 11,000 (2%) from 2002/03.

National companies' attendance was 14% of the total attendance for organisations responding to the survey, up from 12% in 2002/03.

Subsidy per attendance

Arts Council England subsidy per attendance increased by £1.70 (9%) to £20.31 and local authority and other public subsidy per attendance rose by £0.42 (162%); this resulted in total subsidy per attendance increasing by £2.11 (11%) to £20.99. The rise in local authority and other public subsidy per attendance was because of the increase of almost £2.0 million in other public subsidy to the Royal National Theatre.

The total subsidy per attendance varies considerably between the national companies, ranging from £8.47 to £49.07 for those companies operating as usual. Because of the closure of the English National Opera for six months and the consequent fall in audiences, its total subsidy per attendance is over £100.00.

Arts Council England subsidy accounted for almost 97% of subsidy per attendance in the national companies (99% in 2002/03), compared with 77% for all reporting funded organisations and 69% overall for the organisations that are not the national companies. These figures are different to those seen in 2002/03 and reflect the 153% increase in local authority and other public subsidy to the national companies combined with the increase in Arts Council England subsidy of 7%.

Earned income per attendance increased by £1.69 (10%) to £18.67. Across the national companies, earned income per attendance ranges from £5.85 (South Bank centre) to £50.98 (Royal Opera House).

Touring

Five of the national companies reported some touring in 2003/04, a total of 536 performances and exhibition days, down by 67 (11%) on the 603 reported in

2002/03. Two companies increased their touring, one had the same level of touring and three companies reported less toured work. Over one quarter (28%) of the toured work was outside England (150 performances and exhibition days).

New works

The national companies reported 95 new works commissioned in 2003/04, down from 109 in 2002/03. All companies other than the English National Opera commissioned new works in 2003/04. Three national companies reported commissioning fewer new works in 2003/04 compared to 2002/03 and three commissioned more.

10 Service, umbrella and networking organisations

Service, umbrella and networking (SUN) organisations are those which operate nationally (England or UK) or cover two or more regions. In addition, organisations will share one or more of the following characteristics:

- provision of specialist advice
- advocacy and professional representation
- professional development and training
- funding and information services
- a focal point for other organisations and individuals
- links between other organisations
- a communications network

Table 29 Service, umbrella and networking (SUN) organisations

		2003/04
Number of organisations		**47**
	£000s	**%**
Earned income	6,223	26%
Arts Council England subsidy	11,797	50%
Local authority (LA) and other public subsidy	4,138	18%
Contributed income – sponsorship, trusts and donations	1,413	6%
Total income	23,571	100%
Artistic programme costs	9,190	39%
Education costs	1,066	5%
Marketing costs	361	2%
Overheads, staffing and other costs	13,047	55%
Total expenditure	23,664	100%
Surplus/deficit	(93)	
Accumulated surplus/deficit	3,315	
Performances and exhibition days	1,488	
Attendance	**Actual 000s**	**Estimated 000s**
Exhibitions and performances	42	67
Workshop-related sessions	58	9
Totals	100	76

Forty-seven organisations responding to the survey are classified as SUN. This compares with 23 in 2002/03. The 47 organisations comprise 19 that responded in 2002/03 and were classified as SUN in 2002/03, 16 that responded in 2002/03 and were classified as combined arts in 2002/03 plus 11 additional respondents that were not in the 2002/03 analysis.

Fourteen SUN organisations received £443,000 of lottery revenue funding and two received a total of £314,000 lottery stabilisation and recovery funding. One organisation received both types of lottery funding.

Arts Council subsidy ranged from £25,000 to £6.1 million for organisations within this sector. Thirty-five organisations received local authority and other public subsidy, up to a maximum level of £1.2 million. Total subsidy (Arts Council subsidy and local authority and other public subsidy) accounted for 68% of the sector’s income.

Although the group of SUN organisations analysed in the 2002/03 report had some performances and exhibitions, their major attendance figures were for workshop-related sessions. The larger 2003/04 SUN group contains more organisations that put on performances and exhibitions, resulting in attendance at exhibitions and performances totalling 109,000 in addition to workshop attendance of 67,000.

The SUN organisations also commissioned 114 new works (by 16 organisations) and undertook 318 touring performances and exhibition days (by 8 organisations).

11 Touring

General

The criteria for touring and distribution of performances and exhibition days are set out in Appendix 4. The figures in Table 26 relate solely to toured work carried out by funded organisations; figures for touring work funded by project or development funds only are not included.

Of the 628 organisations that completed the 2003/04 survey, 355 (57%) had toured performances or exhibition days away from their home base (temporary or permanent). This is an increase from 2002/03 when 53% of responding organisations indicated they had undertaken touring or distribution of performances or exhibition days.

Some of the touring companies have a national touring remit; others have a regional touring remit.

The table column labelled 'outside England' refers to work either in the UK or abroad. It is worth noting that a number of organisations tour outside England (199 in 2003/04) and for many this is a vital source of earned income.

Activity

The 355 organisations reporting toured work provided 35,617 toured performances and exhibition days in 2003/04, of which 28,537 (80%) took place in England.

Theatre and visual arts together accounted for 79% of toured work in England (theatre 42% and visual arts 37%).

In terms of regional distribution of performances and exhibition days in England, the largest amount of toured work took place in London (24%), South East (16%) and the South West (13%). The other regions each had between 7% and 9% of the total touring in England.

Table 30 Toured performances/exhibition days by region and by artform for 2003/04

	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire	Outside England	Total	% of Total	No of orgs
Combined Arts	41	279	498	25	154	144	267	49	121	266	**1,844**	5%	35
Dance	129	47	94	57	117	149	134	107	83	240	**1,157**	3%	35
Literature	-	4	99	38	11	1	11	3	6	21	**194**	1%	13
Music	291	310	556	37	266	784	456	157	221	451	**3,529**	10%	52
Theatre	968	927	2,920	892	1,011	1,851	1,725	835	901	2,127	**14,157**	40%	135
Visual Arts	1,224	653	2,454	1,206	723	1,526	1,148	913	671	3,900	**14,418**	40%	77
SUN	19	10	115	1	41	26	21	7	3	75	**318**	1%	8
Total	**2,672**	**2,230**	**6,736**	**2,256**	**2,323**	**4,481**	**3,762**	**2,071**	**2,006**	**7,080**	**35,617**	**100%**	**355**

12 New works

The criteria for the new works indicator are set out in Appendix 4. New works are largely supported by individual projects or development grants, which are not included in this document. The figures reported here relate to work by the funded organisations.

Table 31 shows the amount of new works made available in 2003/04 by the funded organisations and also provides a breakdown of new works by artform and by region.

Of the total sample of 628 organisations, 401 reported a total of 3,357 pieces of new work commissioned in 2003/04. In percentage terms, 64% of all survey respondents commissioned new works in 2002/03 compared to 66% in 2002/03 and 65% in 2001/02. The quantity of new works reported for 2003/04 is 5% higher than the total for 2002/03, with the number of survey respondents increasing by 4%.

The constant sample of 434 organisations that responded to both the 2002/03 and 2003/04 surveys reported 2,876 pieces of new work in 2002/03 (by 354 organisations) and 2,987 in 2002/03 (by 349 organisations), a rise of 4%.

Visual arts accounted for 34% of the total number of new works commissioned, with theatre on 18% being the next largest.

Comparing the 2002/03 and 2003/04 figures for the proportions of all new works attributable to each artform shows that the visual arts share of all new works increased from 27% to 34% (the same as in 2001/02), while theatre increased from 14% to 18% and combined arts dropped from 27% to 13%.

In addition, this sample of 628 funded organisations reported 4,520 artists commissioned in 2003/04, 1,897 productions of new commissions, 1,517 productions of other new works, 1,343 new productions of established repertoire and 314 revivals.

Table 31 New work commissioned in 2003/04

	East	East Midlands	London	North East	North West	South East	South West	West Midlands	Yorkshire	National	Total	% of Total	No. of orgs
Combined arts	18	27	131	64	78	39	46	27	7	-	**437**	13%	56
Dance	11	56	97	11	5	31	24	139	8	-	**382**	11%	38
Literature	1	-	192	83	38	-	-	8	54	-	**376**	11%	19
Music	4	1	271	3	4	12	1	13	11	5	**325**	10%	43
Theatre	76	27	183	13	37	29	56	111	62	-	**594**	18%	135
Visual arts	104	65	256	118	215	87	72	157	55	-	**1,129**	34%	94
SUN	27	2	70	4	10	1	-	-	-	-	**114**	3%	16
Total	**241**	**178**	**1,200**	**296**	**387**	**199**	**199**	**455**	**197**	**5**	**3,357**	**100%**	**401**

The survey aims to identify the number of education, learning and participatory arts sessions provided by funded organisations and the number of attendances at these sessions – for example, an individual attending two sessions should ideally be counted twice. Although most organisations have applied this interpretation, it is possible that some have not.

Table 32 shows details about education, learning and participation – programmes, projects, artists and educators. Tables 33 and 34 show details about education, learning and participation – sessions and attendance.

Table 32 Education, learning and participation: programmes/projects/artists/educators, 2003/04

	No.of orgs	Education and/or training programme	Written education/ training strategy	Educational specialist on staff	No. of projects	No. of events	No. of artists	No. of educators
Combined arts	98	95	43	46	3,870	25,780	3,189	1,625
Dance	53	52	29	33	1,100	8,917	3,040	2,544
Literature	35	26	17	14	1,013	2,652	565	2,886
Music	85	75	49	49	1,451	10,231	5,079	2,566
Theatre	174	161	103	102	2,266	18,201	5,985	3,778
Visual arts	136	120	67	66	1,511	11,926	6,449	1,050
SUN orgs	47	33	18	14	135	1,975	735	508
Total	**628**	**562**	**326**	**324**	**11,346**	**79,682**	**25,042**	**14,957**

The reported total number of projects was 11,346, considerably higher than that reported in 2002/03 (8,750). The number of events was also higher at 79,682 (74,283 in 2002/03), but the numbers of both artists and educators presenting these events were down on those reported for 2002/03 – 25,042 artist s compared to 33,686 in 2002/03 and 14,957 educators compared to 18,698.

The total figures for sessions and attendances were 178,815 and 3.6 million, compared to 183,523 and 3.2 million in 2001/02. Some type of education, learning or participatory arts programme was provided by 89% of organisations. This compares to 85% of organisations in 2002/03.

Table 33 Education, learning and participation: sessions and attendance, 2003/04				
	No. sessions	**Attendance**	**Sessions for BME groups**	**Sessions for disabled people**
Combined arts	37,807	848,547	1,924	3,646
Dance	36,161	533,500	1,328	1,451
Literature	4,209	158,588	459	299
Music	24,882	611,639	1,592	912
Theatre	51,964	1,000,678	2,531	2,578
Visual arts	17,360	347,875	726	912
SUN organisations	6,432	67,795	95	240
Total	**178,815**	**3,568,622**	**8,655**	**10,038**
BME: Black and minority ethnic groups				

There were some variations between artforms in this area. Theatre reported the highest number of sessions at close to 52,000 and the highest attendance (1.0 million). The average attendance per session, at 19, was close to the overall average attendance per session (20). Combined arts conducted almost 38,000 sessions with 849,000 attendances whilst dance, with a similar number of sessions (36,000) had an attendance of 533,000, reflecting the generally small size of dance classes (average 15). Music has a higher than average attendance per session at 25 whilst literature reports 38. Literature also reported a high attendance per session in 2002/03. Of the 159,000 attendances at literature sessions, over 71,000 were with one organisation.

Table 34 shows sessions and attendance by different groups and ages.

Attendance at education and training programmes was across all age groups:

- 'aged (4-19) – curriculum related' was the largest group for attendance (36% of total attendance – as in 2002/03)
- 'informal education – mixed age group' was the next largest group (22% of total attendance)
- three-fifths of all sessions were under 'informal education'
- average number per session is highest for the formal education sessions, at 27, and lowest for professional training, at 10

Table 34 Education, learning and participation: sessions and attendance by age group, 2003/04		
	No. sessions	**Attendance**
Formal education, 4-19 age group	**47,423**	**1,298,912**
Informal education		
Under 5 years	4,827	80,104
5-16 years	36,559	638,202
17-19 years	7,876	122,556
Adult (20+)	28,650	398,730
Mixed age group	30,694	794,521
Total informal education	**108,606**	**2,034,113**
Professional training		
Artists	13,250	109,331
Educators (exc teachers)	1,873	18,438
Teachers and trainee teachers	2,200	28,388
Other adults	1,716	28,183
Students (exc trainee teachers)	3,747	51,257
Total professional training	**22,786**	**235,597**
Total	**178,815**	**3,568,622**

14 Black or minority ethnic-led arts

Forty organisations (6% of the total) were Black or minority ethnic-led, using the criteria set out in Appendix 5. Of these 40 organisations, ten were music, nine were combined arts, nine were theatre, seven were visual arts and three were dance. One was literature and one was a support organisation. Twenty-five undertook some touring activity and 26 produced new work in 2003/04.

Thirty-six of the Black or minority ethnic-led (BME) organisations were in the 2002/03 African, Caribbean, Chinese or Asian-led sample.

Twelve BME-led organisations received £252,000 of lottery revenue funding and one organisation received £550,000 of lottery stabilisation and recovery funding.

Table 35 shows the data for the 40 BME-led organisations. A further 174 (28% of the total sample) reported that some part of their activity during the year was BME-led.

Of the 40 BME-led organisations:

- 32 had a board or management committee comprising a majority of members of Black or minority ethnic descent. A further five had a board or management committee where 50% of members were of Black or minority ethnic descent

For those organisations providing a breakdown of permanent staffing profile:

- 18 (of 23) reported 50% or more of artistic permanent staff who are of Black or minority ethnic descent
- 28 (of 31) reported 50% or more of executive staff who are of Black or minority ethnic descent

Economy

Arts Council England subsidy reported by organisations in this sector ranged from £39,500 to over £880,000, a similar range to that seen in the previous surveys. Total subsidy (Arts Council England subsidy and local authority and other public subsidy) accounted for 73% of this sector's income (for the full sample of funded organisations, Arts Council England and local authority and other public subsidy accounted for 49% of total income). Earned income accounted for 23% of total income.

Table 35 Black or minority ethnic-led arts

			2003/2004
Number of organisations			**40**
		£000s	**%**
Earned income		2,664	23%
Arts Council England subsidy		7,117	61%
Local authority (LA) and other public subsidy		1,388	12%
Contributed income – sponsorship, trusts and donations		454	4%
Total income		11,623	100%
Artistic programme costs		3,781	32%
Education costs		834	7%
Marketing costs		735	6%
Overheads, staffing and other costs		6,568	55%
Total expenditure		11,918	100%
Surplus/deficit		(295)	
Accumulated surplus/deficit		777	
		Number	
Performances and exhibition days		2,667	
Performances for young people		219	
Attendance		**Actual 000s**	**Estimated 000s**
Exhibitions and performances		410	98
Workshop-related sessions		54	17
Totals		464	115
Published and broadcast		64	6,888
Subsidy per attendance (£)	**Arts Council England**	12.28	
	LA and other public	2.39	
	Total	14.67	
Earned income per attendance (£)		4.60	

Attendance
Attendance figures in this sector continue to vary considerably between surveys. While this is in part due to the different organisations responding to each survey, there are also differences between the figures reported by the same organisations from year to year. This may be a reflection of actual year-on-year differences or may be a reporting phenomenon. In addition, particularly in the area of carnivals and festivals, some of the estimated attendance figures have been subject to reassessment and are now rather lower than reported in previous years. Reported total attendance in 2003/04 was 579,000 of which just 115,000 were estimated attendances. There were 71,000 attendances at workshop-related sessions. Eleven organisations within the sector accounted for an estimated broadcast audience of close to seven million.

With much lower attendance figures than in 2002/03, total subsidy per attendance was £14.67, Arts Council England subsidy per attendance stood at £12.28, and local authority and other public subsidy per attendance was £2.39. Earned income per attendance rose to £4.60.

15 Disability-led arts

Fourteen organisations were disability-led, using the criteria set out in Appendix 5 (2% of the total sample). Thirteen of these organisations were in the 2002/03 disability-led sample.

Table 36 Disability-led arts

			2003/2004
Number of organisations			**14**
		£000s	**%**
Earned income		713	17%
Arts Council England subsidy		2,148	50%
Local authority (LA) and other public subsidy		667	16%
Contributed income – sponsorship, trusts and donations		733	17%
Total income		4,261	100%
Artistic programme costs		1,444	34%
Education costs		163	4%
Marketing costs		153	4%
Overheads, staffing and other costs		2,522	59%
Total expenditure		4,282	100%
Surplus/deficit		(21)	
Accumulated surplus/deficit		390	
		Number	
Performances and exhibition days		1,423	
Performances for young people		65	
Attendance		**Actual 000s**	**Estimated 000s**
Exhibitions and performances		40	33
Workshop-related sessions		20	1
Totals		60	34
Published and broadcast		27	500
Subsidy per attendance (£)	**Arts Council England**	22.68	
	LA and other public	7.04	
	Total	29.72	
Earned income per attendance (£)		7.53	

Seven disability-led organisations were support organisations, three were theatre, two were combined arts and two visual arts. Nine organisations undertook touring and ten produced new work in 2003/04.

Six disability-led organisations received £266,000 of lottery revenue funding and one of these also received £249,000 lottery stabilisation and recovery funding.

In addition to the 14 disability-led organisations, a further 136 companies (22% of all organisations) reported that some part of their activity throughout the year was disability-led.

Of the 14 organisations in this sector, ten reported that they employed artistic staff on a permanent basis and in eight cases this included people with disabilities. Twelve organisations reported numbers of executive staff and three of these included people with a disability.

For the disability-led organisations, ten had a board with 50% or more members who were people with disabilities and the remaining four all had one or more members with disabilities.

Economy

Arts Council subsidy ranged from £43,000 to £412,000 for organisations within this sector. Total subsidy (Arts Council subsidy and local authority and other public subsidy) accounted for 66% of the sector's income (as in 2002/03). Earned income now accounted for 17% of total income.

Attendance

Total attendance amounted to 94,000, of which 21,000 was workshop-related.

Total subsidy per attendance, at £29.72, is lower than seen in 2002/03 because of the higher reported attendance figures and despite a 21% increase in overall subsidy.

Earned income per attendance was £7.53.

Equal opportunities

This is the eighth year for data collection on the gender balance, ethnic composition and disability status of permanent staff, boards and management committees. These are shown in Tables 37 and 38.

The response rate to the overall staffing questions (permanent and freelance/contractual staff) was almost 100%, with only one organisation not providing details of either permanent and/or freelance/contractual staff. Twenty-nine organisations reported having freelance/contractual staff but no permanent staff.

Table 37 Equal opportunities: permanent staff, 2003/04

	Gender			**Ethnic group**			**Disability**
	Total	Male	Female	Total	Black / Asian	White	Disabled people
Combined arts	1,907	733	1,174	1,904	165	1,739	62
		38%	*62%*		*9%*	*91%*	*3%*
Dance	1,202	506	696	1,206	120	1,086	26
		42%	*58%*		*10%*	*90%*	*2%*
Literature	134	43	91	134	16	118	9
		32%	*68%*		*12%*	*88%*	*7%*
Music	2,525	1,254	1,271	2,456	155	2,301	43
		50%	*50%*		*6%*	*94%*	*2%*
SUN organisations	390	118	272	389	41	348	35
		30%	*70%*		*11%*	*89%*	*9%*
Theatre	4,956	2,006	2,950	4,318	254	4,064	70
		40%	*60%*		*6%*	*94%*	*1%*
Visual arts	1,665	602	1,063	1,665	127	1,538	51
		36%	*64%*		*8%*	*92%*	*3%*
Totals	**12,779**	**5,262**	**7,517**	**12,072**	**878**	**11,194**	**296**
		41%	*59%*		*7%*	*93%*	*2%*

The total permanent staffing figure reported for 2003/04 was 12,779 but some organisations did not provide a breakdown of their permanent staffing figures by ethnic grouping and disability. Some companies do not carry out an analysis of this sort and could not supply data; this is reflected in the difference in totals between the gender and ethnic group columns.

Permanent employees are predominantly female (59%), 1% higher than in 2002/03. The percentage of female employees ranged from 50% in music organisations to 70% in SUN organisations. Contractual staff were more evenly divided by gender, with 52% male and 48% female.

Table 38 Equal opportunities: board/management committee membership, 2003/04

	Gender			Ethnic group			Disability
	Total	Male	Female	Total	Black / Asian	White	Disabled people
Combined arts	830	479 *58%*	351 *42%*	830	111 *13%*	719 *87%*	42 *5%*
Dance	417	214 *51%*	203 *49%*	417	40 *10%*	377 *90%*	14 *3%*
Literature	289	137 *47%*	152 *53%*	289	44 *15%*	245 *85%*	17 *6%*
Music	748	515 *69%*	233 *31%*	748	97 *13%*	651 *87%*	17 *2%*
SUN organisations	353	184 *52%*	169 *48%*	353	39 *11%*	314 *89%*	52 *15%*
Theatre	1,527	882 *58%*	645 *42%*	1,527	155 *10%*	1,372 *90%*	53 *3%*
Visual arts	1,123	656 *58%*	467 *42%*	1,123	99 *9%*	1,024 *91%*	39 *3%*
Totals	**5,287**	**3,067** *58%*	**2,220** *42%*	**5,287**	**585** *11%*	**4,702** *89%*	**234** *4%*

The majority of board and management committee members were male, at 58%, as in 2002/03. The percentage of male board and management committee members varied across artforms, ranging from 47% in literature to 69% in music.

The 2001 Census reported that Black or Black British and Asian or Asian British people account for 7% of the population of England[6]. The figures supplied by funded organisations for 2003/04 indicated 7% of permanent employees were

[6] Office for National Statistics (2003b). 2001 Census Data. Online at www.statistics.gov.uk

Black or minority ethnic with the percentage varying across artforms from 6% in theatre and music to 12% in literature and 11% in SUN organisations.
The analysis of contractual staff shows that 16% of contractual staff were from a non-white background. It is important to remember that there may be some double-counting in this question in that the same contractual staff may have worked for more than one (possibly many) different organisations during the year and could be recorded on more than one survey response. Also, if any group tended to have shorter periods of contractual employment, and hence possibly a greater number of employment periods during the year, then its apparent representation would be increased.

The overall percentage of Black or minority ethnic board members decreased to 11%, from 12% in 2002/03. The percentage varies across artforms ranging from 9% in visual arts to 15% in literature, with music and combined arts reporting 11%.

Two trends that were noted in the 2002/03 report – decreasing male majorities amongst board membership and increasing BME representation – are not continued in the 2003/04 survey. It will be for the 2004/05 analysis to indicate whether these trends are simply interrupted or whether they no longer operate.

Disabled people constituted 2% of total permanent staffing, ranging from 1% in theatre to 9% in SUN organisations and 7% in literature. Two percent of contractual staff had disabilities. Overall, 4% of board members were disabled people with the percentage varying across artforms, ranging from 2% in music to 15% in SUN organisations.

Contractual staff, volunteers and staff training

In addition to the questions relating to permanent staff, the 2003/04 survey also asked for numbers of freelance or contractual staff employed by each organisation plus information on any volunteers who helped during 2003/04. A further question requested details of staff development training.

The results were similar to those seen in 2002/03 and continue to show a high number of organisations with contractual staff at 89%, the same as in the last survey compared to 87% in 2001/02 and 83% in 2000/01. The total number of contractual staff reported was 24,757, up from 19,850 in 2002/03, albeit with a larger sample in the current survey.

It is important to note that the survey records the number of contractual staff who worked with each organisation. This means that if for example a musician works during the year with several different orchestras then he or she will be counted more than once in the total of contractual staff. This needs to be considered in using the survey results.

Table 39 Equal opportunities: contractual staff, 2003/04

	Gender			Ethnic group			Disability
	Total	Male	Female	Total	Black / Asian	White	Disabled people
Combined arts	2,230	983	1,247	1,700	331	1,369	43
		44%	*56%*		*19%*	*81%*	*2%*
Dance	2,412	1,123	1,289	2,326	375	1,951	22
		47%	*53%*		*16%*	*84%*	*1%*
Literature	711	313	398	489	154	335	14
		44%	*56%*		*31%*	*69%*	*2%*
Music	8,743	5,005	3,738	8,186	1,566	6,620	181
		57%	*43%*		*19%*	*81%*	*2%*
SUN organisations	692	317	375	609	55	554	172
		46%	*54%*		*9%*	*91%*	*25%*
Theatre	7,852	4,226	3,626	7,027	853	6,174	97
		54%	*46%*		*12%*	*88%*	*1%*
Visual arts	2,117	983	1,134	1,840	257	1,583	44
		46%	*54%*		*14%*	*86%*	*2%*
Totals	**24,757**	**12,950**	**11,807**	**22,177**	**3,591**	**18,586**	**573**
		52%	*48%*		*16%*	*84%*	*2%*

The total number of volunteers was reported to be 10,141 with 6,060 (60%) female and 3,297 (40%) male. Seventy-four combined arts organisations had a total of 3,166 volunteers and 100 theatre companies had 2,499 volunteers. The SUN organisations had a high number of volunteers at 1,091, across 20 organisations. Overall 381 organisations (61% of all organisations) reported having volunteers. Volunteers are predominantly part-time (almost 99%) although theatre reported 84 full-time volunteers.

The percentage of permanent staff receiving training in 2003/04 increased to 55% compared to 47% in 2002/03 and 39% in 2001/02. Six percent of contractual staff received training in 2003/04 compared with 8% in 2002/03. The number of volunteers who received training in 2003/04 was 20%, compared with 19% in the last survey.

In each type of staff there is a higher percentage of female staff receiving training: for permanent staff 58% of females had training compared to 50% of males; in freelance/contractual staff 8% of females and 4% of males received training and for volunteers 21% of females and 19% of males.

Appendix 1

Criteria for collection of data for performance indicators, 2003/04

Data are collected from arts organisations with which the Arts Council has an annual funding agreement, or, in some cases, those organisations with which a funding agreement is about to be negotiated. These are regularly funded organisations referred to earlier in this report as funded organisations.

Data relating to development funds are included only where it applies to these organisations (for instance, if a funded organisation receives additional funding for a specific project).

Organisations with which the funding system has a funding agreement are:

- those considered to be of key strategic importance by the funding body
- those covered by the appraisal system
- those in regular receipt of a grant of more than £25,000 from the funding body

Appendix 2

Definition of income categories

Earned income is defined as income from ticket sales, entrance fees, sale of books and magazines, workshop fees, catering, merchandising, programmes etc.

Arts Council England subsidy is regular funding from Arts Council England, plus development funding where it relates to any of the organisations covered by this report. This refers mainly to monies received from grant-in-aid. Monies received through lottery capital grants are not included here, although lottery stabilisation and Grants for the arts are included.

Local authority and other public subsidy is revenue and project funding from local authorities and other public bodies, excluding capital funding.

Contributed income relates to income from sponsorship, trusts and donations and includes BSIS awards and income from 'Friends' organisations.

Definition of expenditure categories

Artistic programme costs include the direct costs of the main programme of work (eg production costs, artists' fees, contributor fees, exhibition hire, venue hire). In addition, Grants for the arts costs are included under this heading.

Education costs include all costs directly attributable to the education programme including staff costs other than permanent staff or people employed in the artistic programme.

Marketing costs include all marketing costs, both production and generic marketing expenditure (marketing the organisation rather than the production), but not marketing staff salaries.

Overheads, staffing and other costs include all administration costs (post, telephone, audit fees and insurance), premises costs (rent, heat and lighting) and salaries or wages for all permanently employed full-time and part-time artistic and non-artistic staff. This does not include the cost of temporary staff brought in for a particular artistic programme on short-term contracts; these are included in artistic programme costs.

Appendix 3

Definition of audience categories

Exhibitions and performances include attendance figures for exhibitions, performances, screenings, and readings.

Workshop-related sessions include attendance figures for workshops, seminars, courses, residencies, talks, lectures, participatory activities and other training.

Published and broadcast includes figures for sales, rentals and loans of ‘primary’ art experiences, which have been produced by the listed organisations (such as books, compact discs, magazines, records, tapes and videos).

Attendance figures are based on:

- **actual take-up** (‘known’ attendance) – includes actual figures derived from records kept, for example tickets sales.
- **estimated take-up** – will be reported where no actual figure exists, usually where entry is free or no reliable record is kept. Estimated figures are provided by the organisations themselves and not by Arts Council England.

Appendix 4

Criteria for touring indicator

This is the number of performances or exhibition days per region per artform in any financial year. Touring includes exhibitions, public readings etc, as well as performing arts work. This indicator shows the pattern of touring work.

Touring performances made possible by project or development funding are not included in this document.

Criteria for new works indicator

This indicator will count only commissions of new works which are created as a result of the funding. The intention must be that the work will be presented on some future date.

New translations, new productions etc are not included.

The work is counted in the year that the funding is made available and not when it is presented.

If a grant is offered to commission more than one piece of new work, eg a grant for a dance piece to cover both music and choreography, and there is a strong possibility that a discrete part of that work may be performed separately in the future, that element may be counted as an additional commission.

Commissions made possible by project or development funding are not included in this document.

Criteria for education indicator

This indicator counts the number of sessions, and the artists involved, spent on work in an educational context for people in the age range 4-19.

A day is divided into three sessions, morning, afternoon and evening. There can be more than one session in a day. This need not be restricted to work carried out in schools; it can cover sessions with teachers in preparation for the work to be undertaken with young people.

Education work made possible by project or development funding is not included in this document.

Appendix 5

Criteria for cultural diversity indicators:

Black or minority ethnic-led work and disability-led work

This performance indicator measures the amount spent on and number of Black or minority ethnic-led and/or disability-led organisations or initiatives.

Each grant made by a funding body should be included providing they meet the following criteria:

- self-definition – an organisation must define its own work as either Black or minority ethnic-led or disability-led
- the definition is not made by the funding organisation

If an organisation does consider its work to fall in either of these categories, then two out of three of the following criteria need to be met:

- more than 50% of the board of directors are of Black or minority ethnic descent or are disabled people
- more than 50% of staff at executive level are of Black or minority ethnic descent or are disabled people
- more than 50% of artists engaged in the funded work are of Black or minority ethnic descent or are disabled people

The first two criteria apply only to funded organisations.

In the case of projects and schemes, where the self-definition criterion might be difficult to apply, the third criterion would have to be met in order for the work to be included.

If an organisation does not define its work in either of these categories, there may, nonetheless, be a significant amount of their work that can be defined as either Black or minority ethnic-led or disability-led. Significant amount in this context means more than 10%. In this instance the following criterion must apply:

- more than 50% of artists engaged in the funded work are of either Black or minority ethnic descent or are disabled people

Appendix 6

Cultural diversity: sample questions for 1995/96 - 2003/04

1995/96 questions
Do you define your work under the following heading? Arts and disability

Yes/No

Do you define your work under the following heading? Cultural diversity

Yes/No

1996/97 and 1997/98 questions
Is the organisation and its programme disability-led?

Yes/No

Is the organisation and its programme African, Caribbean or Asian-led?

Yes/No

1998/99, 1999/2000, 2000/01 and 2001/02 questions
Is the organisation and its programme disability-led?

Yes/No

Is the organisation and its programme African, Caribbean, Chinese or Asian-led?

Yes/No

2002/03 questions
Is the organisation or its programme disability-led?

Yes/No

Is the organisation or its programme African, Caribbean, Chinese or Asian-led?

Yes/No

2003/04 questions
Is your organisation disability-led?

Yes/No

Is your organisation's programme disability-led?

Yes/No

Is your organisation Black or minority ethnic-led?

Yes/No

Is your organisation's programme Black or minority ethnic-led?

Yes/No

Appendix 7

Full list of organisations included in the data set

Combined arts

National company

The South Bank Centre – Royal Festival Hall

Carnival

London School of Samba
Luton Carnival Arts Development Trust
South Connections Carnival Band

Festivals and participatory organisations

Action Factory
Action Space
Artsreach
Bath Festivals Trust
Beavers Arts
Brazilian Contemporary Arts
Canterbury Festival
Carousel
City Arts
Community Arts North West
Community Focus
Doncaster Community Arts (darts)
Dot to Dot
Eden Arts
EQUATA UK
First Movement
Future Factory
Healing Arts
High Peak Community Arts
Manchester International Arts
Mantle Community Arts
Multi Asian Arts
NOW Festival
Paddington Arts
Play-train Ltd
PRESCAP
Rural Arts North Yorkshire (RANY)
Salisbury Festival
Same Sky
SAMPAD
Soft Touch Community Arts
Studio 3 Arts
Take Art!
Weekend Arts College
Welfare State International

Interdisciplinary arts

Artlink Exchange
Artlink West Yorkshire
Arts Alive
Black Country Touring
Brouhaha International
Chol Theatre
Corridor Arts
Customs House
FORMA
Hall for Cornwall
Helix Arts
Lighthouse (Poole Arts Centre)
Live and Local
Motiroti
Norden Farm Arts Centre
Northern Cultural Skills Partnership (NCSP)
Salisbury Arts Centre
Square Chapel Centre for the Arts
Stamford Arts Centre (South Kesteven District Council)
Strange Cargo
Tees Valley Arts
The Courtyard Centre for the Arts
Trinity
Whitewood and Fleming

Multidisciplinary venue

Artsdepot
Barbican Theatre

Beaford Arts
Blackfriars Arts Centre
Brewery Arts Centre
Brewery Arts, Cirencester
Brewhouse Theatre and Arts Centre
Bridport Arts Centre
Darlington Arts Centre
Gardner Arts Centre
Hoxton Hall
Jacksons Lane
Kuumba
Lawrence Batley Theatre
Leeds Metropolitan University Gallery & Studio Theatre
Maltings Art Centre
Midlands Arts Centre (MAC)
Norwich Arts Centre
Phoenix Arts
Polish Social & Cultural Association (POSK)
Quay Arts Centre
Queen's Hall Arts Centre, Hexham
Queer Up North
Riverside Studios
Roadmender
South Hill Park Arts Centre
South Holland Arts Centre
Southport Arts Centre
The Drum
The Junction
Warwick Arts Centre
Watermans Arts Centre
Watershed
Wingfield Arts
Worcester Arts Workshop

Dance

Large-scale performing companies
Birmingham Royal Ballet (BRB)
English National Ballet
Northern Ballet Theatre (NBT)
Rambert Dance Company
Royal Ballet

Medium and small-scale performing companies
Attik Dance
Badejo Arts
Blue Eyed Soul
CandoCo
Cholmondeleys and Featherstonehaughs
Contemporary Dance Trust (The Place)
DV8 Physical Theatre
Ludus Dance Agency
Phoenix Dance Theatre
Random Dance Company
Ricochet Dance Productions
Salamanda Tandem
Shobana Jeyasingh Dance Company
Siobhan Davies Dance Company
Union Dance
Vincent Dance Theatre
Yolande Snaith Theatre Dance

Dance promoting organisations
Activate
Akademi
Bucks Dance
Cheshire Dance
Chisenhale Dance Space
Dance 4
Dance City
Dance East
Dance Initiative Greater Manchester
Dance Northwest
Dance South West
Dance UK
Dance Umbrella
Dance Xchange

Derby Dance Centre
East London Dance
Essexdance
Foundation for Community Dance (FCD)
Gloucestershire Dance
Greenwich Dance Agency
Hampshire Dance
Independance
Independent Dance
Jabadao
Kala Sangam
Moving East
Sadler's Wells
South East Dance Agency
Swindon Dance
The Works! Dance and Theatre Cornwall
Woking Dance Festival

Literature

Ambit
Anvil Press
Apples & Snakes
Arvon Foundation
Bloodaxe Books
Carcanet Press
Centerprise Trust
Children's Discovery Centre
Commonword
Eastside Arts
Enitharmon Press
Federation of Worker Writers and Community Publishers
Ilkley Literature Festival
Lancaster LitFest
Lapidus
Literary Consultancy
London Magazine
Moving Finger
National Association for Literature Development
National Association of Writers in Education
New Writing North
Peterloo Poets
Poems on the Underground
Poetry Book Society
Poetry Can
Poetry School
Poetry Society
Reading Agency
Script
Seven Stories – Centre for the Children's Book
Spread the Word
Survivors Poetry
The Poetry Trust
Windows Project
Yorkshire Art Circus

Music

Large-scale opera
English National Opera (ENO)
Glyndebourne Touring and Education
Opera North
Royal Opera House (ROH)
Welsh National Opera (WNO)

Orchestras
Birmingham Contemporary Music Group
Britten Sinfonia
City of Birmingham Symphony Orchestra (CBSO)
City of London Sinfonia
Eastern Orchestral Board
Halle Concerts Society
London Mozart Players
London Philharmonic Orchestra

London Sinfonietta
London Symphony Orchestra
Manchester Camerata
Orchestra of the Age of Enlightenment
Philharmonia Orchestra
Royal Liverpool Philharmonic Society
Royal Philharmonic Orchestra (RPO)
ViVA
The Orchestra of the East Midlands

Other music

African and Caribbean Music Circuit (ACMC)
Aldeburgh Productions
Asian Dub Foundation Education
Asian Music Circuit
Association of British Calypsonians
Association of Festival Organisers
Bharatiya Vidya Bhavan (Bhavan Centre)
Birmingham Opera Company
British Music Information Centre (BMIC)
British Youth Opera
Buxton Festival
CM
Community Music East
Contemporary Music Making for Amateurs (COMA)
Continental Drifts Ltd
Cultural Co-operation
Dartington Plus
Early Music Network
Emmnet
English Touring Opera (ETO)
Ex Cathedra
Firebird Trust
Folk Arts Network
Folk South West
Generator
Gig Right UK
Grand Union
Huddersfield Contemporary Music Festival (HCMF)
Inner City Music
Jazz Action
Jazz Services
Joyful Noise
London International Jazz Festival
Making Music North East
Making Music South
Making Music Yorkshire
Midi Music
Milton Keynes City Orchestra
Music for Change
Nash Concert Society
Natalie Steed Productions
National Opera Studio
National Youth Jazz Orchestra
NMC Recordings
Overtones
Oxford Contemporary Music
Pimlico Opera
Raw Material Music & Media
Society for the Promotion of New Music (SPNM)
Sonic Arts Network
Sound it Out
Sound Sense
South East Music Schemes (SEMS)
Spitalfields Festival
The Anvil
The Sage Gateshead
The Stables
Tomorrow's Warriors
Traditional Arts Projects (TAPS)
Urban Development
Urban Strawberry Lunch
Wiltshire Music Centre
Wren
York Early Music Festival

Support, umbrella and networking organisations (SUN)

ALISS (Artists & Learning Information Support Services)
All Ways Learning
AMH
Arts & Business (N)
Arts & Business East Midlands
Arts & Business South East
Arts & Business Yorkshire
Arts About Manchester
Arts Catalyst
Arts Inform
Arts Service [Lincs Touring]
Arts Training Central
Artsline
Artswork
Audiences Central (Birmingham Arts Marketing)
Audiences London
Audiences Yorkshire
Black Arts Alliance
Business in the Arts: North West
Cheshire Rural Touring Network
Circus Space
Creative Arts Partnerships in Education UK (Cape UK)
DADA South
Empowering the Artist (ETA)
Interchange Trust Legal Services
Liverpool Centre for Arts and Development
London Disability Arts Forum
London Education Arts Partnership (LEAPArts)
London Youth Arts Network
Momentum Arts
Mongrel
National Disability Arts Forum
North West Disability Arts Forum
Northern Disability Arts Forum
Redcar & Cleveland Council
Seachange
Shape London
Showhow
Smart Audiences
South West Arts Marketing
Sponsors Club for Arts & Business
Spot On, Lancashire's Rural Touring Network
Sussex Arts Marketing
TEAM
Vocaleyes
Voluntary Arts Network

Theatre

National company
Royal National Theatre
Royal Shakespeare Company

National touring company
Actors Touring Company (ATC)
Cardboard Citizens
Clean Break
Compass Theatre Company
David Glass Ensemble
Duckie
Eastern Angles Theatre Company
English Touring Theatre (ETT)
Faulty Optic
Forced Entertainment
Forkbeard Fantasy
Foursight Theatre
Frantic Assembly
Geese Theatre
Graeae Theatre Company
Hoipolloi

Horse + Bamboo Theatre Co
Improbable
Interplay Theatre
IOU Theatre
Kali
Kaos
Kazzum
Kneehigh Theatre
London Bubble
Mind the Gap
Monster Productions
Natural Theatre (Bath Arts Workshop)
New Perspectives
Nitro
Oily Cart Company
Out of Joint
Pacitti Company, The
Paines Plough
People Show
Pilot Theatre
Pop Up Theatre Ltd
Quicksilver Theatre
Reckless Sleepers
Red Ladder Theatre Company
Red Room
Red Shift Theatre Company
Rejects Revenge
Scarlet
SETA
Shared Experience
Sixth Sense Theatre Company
Sphinx
Stans Café
Talawa Theatre
Tamasha Theatre Company
Tara Arts Group
Theatre Alibi
Theatre Centre
Theatre de Complicite
Theatre Melange
Theatre Rites
Third Angel
Tiata Fahodzi
Travelling Light Theatre
Trestle Theatre Company
Walk the Plank
Yellow Earth Theatre

Presenting theatre

Arena Theatre
Battersea Arts Centre (BAC)
Cambridge Arts Theatre
Farnham Maltings
Lichfield Garrick
Merlin Theatre
New Theatre Royal Portsmouth
Newcastle Theatre Royal
Roses Theatre, Tewkesbury
Sunderland Empire
Winchester Theatre Royal

Regional producing theatre

Almeida Theatre
Arcola
Belgrade Theatre, Coventry
Birmingham Repertory Theatre
Bolton Octagon Theatre
Bristol Old Vic
Bush Theatre (Alternative Theatre Co)
Chichester Festival Theatre
Cleveland Theatre Company (CTC)
Derby Playhouse
Dodgy Clutch
Donmar Warehouse
Dukes Playhouse
English Stage Company (Royal Court Theatre)
Everyman Theatre, Cheltenham
Gate Theatre
Hackney Empire
Half Moon Young People's Theatre

Hampstead Theatre
Harrogate Theatre
Haymarket Basingstoke
Hull Truck Theatre
Leicester Haymarket
(Leicester Theatre Trust)
Live Theatre
Lyric Theatre
Mercury Theatre, Colchester
New Victoria Theatre
New Wolsey Theatre
Northampton Theatres Trust
Northcott Theatre
Northern Stage
Norwich Puppet Theatre
Nottingham Playhouse
(Nottingham Theatre Trust)
NTC Touring Theatre Company
and InterACT
Nuffield Theatre, Lancaster
Nuffield Theatre, Southampton
Oldham Coliseum
Orange Tree
Oxford Playhouse
Polka Theatre for Children
Queen's Theatre, Hornchurch
Royal Exchange Theatre
Sheffield Theatres
Soho Theatre Company
Stephen Joseph Theatre
Theatre Royal Plymouth
Theatre Royal Stratford East
Theatre Sans Frontieres
Tricycle Theatre
Unicorn Theatre for Children
Watermill Theatre
Watford Palace Theatre
West Yorkshire Playhouse
York Theatre Royal
Young Vic
Yvonne Arnaud Theatre
Zap Art

Regional touring theatre
Blaize
C&T (Collar and Tie)
Channel Theatre Company
Common Players
Forest Forge
Oxfordshire Touring Theatre Company (OTTC)
Pentabus
Talking Birds

Theatre festival
International Workshop Festival (IWF)
London International Festival of Theatre (LIFT)
London International Mime Festival (LIMF)
National Student Drama Festival
Norfolk and Norwich Festival

Other theatre
ACTA
Alnwick Playhouse Trust
Art Asia
Emergency Exit Arts
Greenwich and Lewisham Young People's
Theatre (GYPT)
Lawnmowers
Louth Playgoers
Merseyside Young People's Theatre
Miracle Theatre
National Youth Theatre
New Peckham Varieties
New Vic Workshop
North Country Theatre
North West Playwrights
Northern Broadsides
Old Town Hall, Hemel Hempstead
Open Theatre Company
Quondam

SNAP People's Theatre
Southwark Playhouse
Spare Tyre
Theatre Company Blah Blah Blah
Theatre Resource
Tiebreak
Tutti Frutti Productions
Unity Theatre Company
Visions
Yorkshire Women Theatre

Visual arts

National company
The South Bank Centre – Hayward Gallery

Galleries/Venues
Angel Row Gallery
APNA Arts
Arnolfini
Artsway
Aspex Gallery
Baltic Centre for Contemporary Art
Beaconsfield
Bilston Craft Gallery
Bristol Architecture Centre
Building Exploratory
Cafe Gallery
Camden Arts Centre
Castlefield Gallery
Chisenhale Gallery
Cornerhouse
Crescent Arts
CUBE
Cubitt Artists Ltd
De La Warr Pavillion
Devon Guild of Craftsmen
Exeter Phoenix
Fabrica
Firstsite
Focal Point Gallery
Gasworks Gallery
Ikon Gallery
Institute of Contemporary Art (ICA)
John Hansard Gallery
Kettle's Yard
Kings Lynn Arts Centre
Matt's Gallery
Middlesbrough Institute of Modern Art (MIMA)
Milton Keynes Gallery
Modern Art Oxford
National Glass Centre
New Art Gallery Walsall
Newlyn Art Gallery
Northern Gallery for Contemporary Art
Norwich Gallery
Nottingham Castle Museum and Gallery (NCMG)
Open Eye Gallery
Pallant House
Photofusion
Photographers Gallery
Q Arts
Serpentine Gallery
Side Gallery
Site Gallery
South London Gallery
Spacex Gallery
The Showroom
Towner Art Gallery and Local Museum
Turner Contemporary
Usher Gallery
Walford Mill Craft Centre
Whitechapel Art Gallery
Winchester Gallery
Wolverhampton Art Gallery
Yorkshire Sculpture Park

Producing and development agencies or publishers

[a-n] The Artists' Information Company
Acme
ADAPT Trust
Art Monthly
Art Shape
Artangel Trust
Artpoint
Artquest
Arts & Technology Partnerships
ASF Weave
Association for Contemporary Jewellery
Autograph: The Association of Black Photographers
Axis
B3 Media
Black Umbrella
Blast Theory
Book Works
Commissions East
Contemporary Art Society
Contemporary Glass Society
Crafts Council
Crafts Development Agency
Craftspace Touring
Culture Company
Daily Life
EMACA
Engage
English Heritage
Film and Video Umbrella
Heart 'n Soul
Institute of International Visual Arts (inIVA)
Isis Arts
Ixia
Kielder Partnership
Lighthouse Media Centre
LIME
Littoral
Live Art Development Agency
Liverpool and Manchester Design Initiative
Liverpool Biennial
LOCUS+
London Print Studio
London Printworks Trust
Lovebytes
Lux
Media Art Bath
Midwest
National Society for Education in Art and Design (NSEAD)
New Contemporaries
North Kesteven District Council Arts Team
Northern Architecture
Northern Print Studio
onedotzero
Pavilion
Photoworks
Picture This
Portfolio Magazine
Public Art – West Midlands
Public Art South West
Public Arts Yorkshire
PVA
Rhubarb Rhubarb
SCAN
Shinkansen
Shisha
SPACE
St Ives International
Station House Opera
Stour Valley Arts
Stroud Valley Artspace
The Art House
The Public
Triangle Arts Trust

Visiting Arts
Visual Arts and Galleries Association
Vivid

Returns not included in data set
Action Transport
Architecture Foundation
Bigga Fish
Colchester Arts Centre
Croydon Clocktower
Drake Music Project
Hawth, Crawley Borough Council
Lakeland Arts Trust
London Musicians’ Collective
National Association of Youth Theatre
National Youth Dance Company
New Writers Network
Performing Arts Lab
Proper Job Theatre
Serious
Wolsey Gallery
Writers in Prison Network
Yorkshire Dance

Appendix 8

Income and expenditure comparisons 2000/2001 - 2003/04 for artforms and national companies

Chart 1 - All organisations income and expenditure comparison

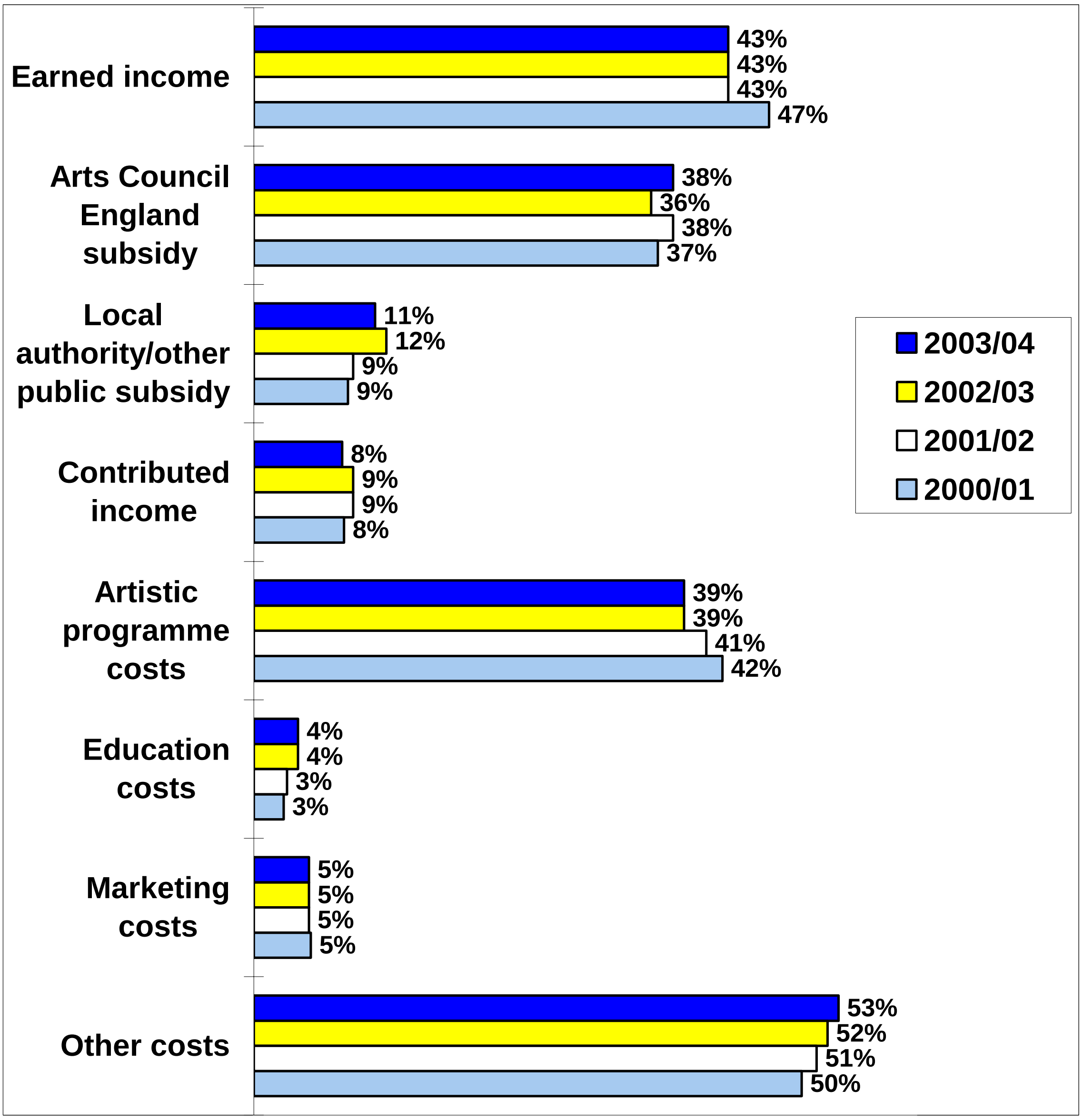


Chart 2 Combined arts income and expenditure comparison

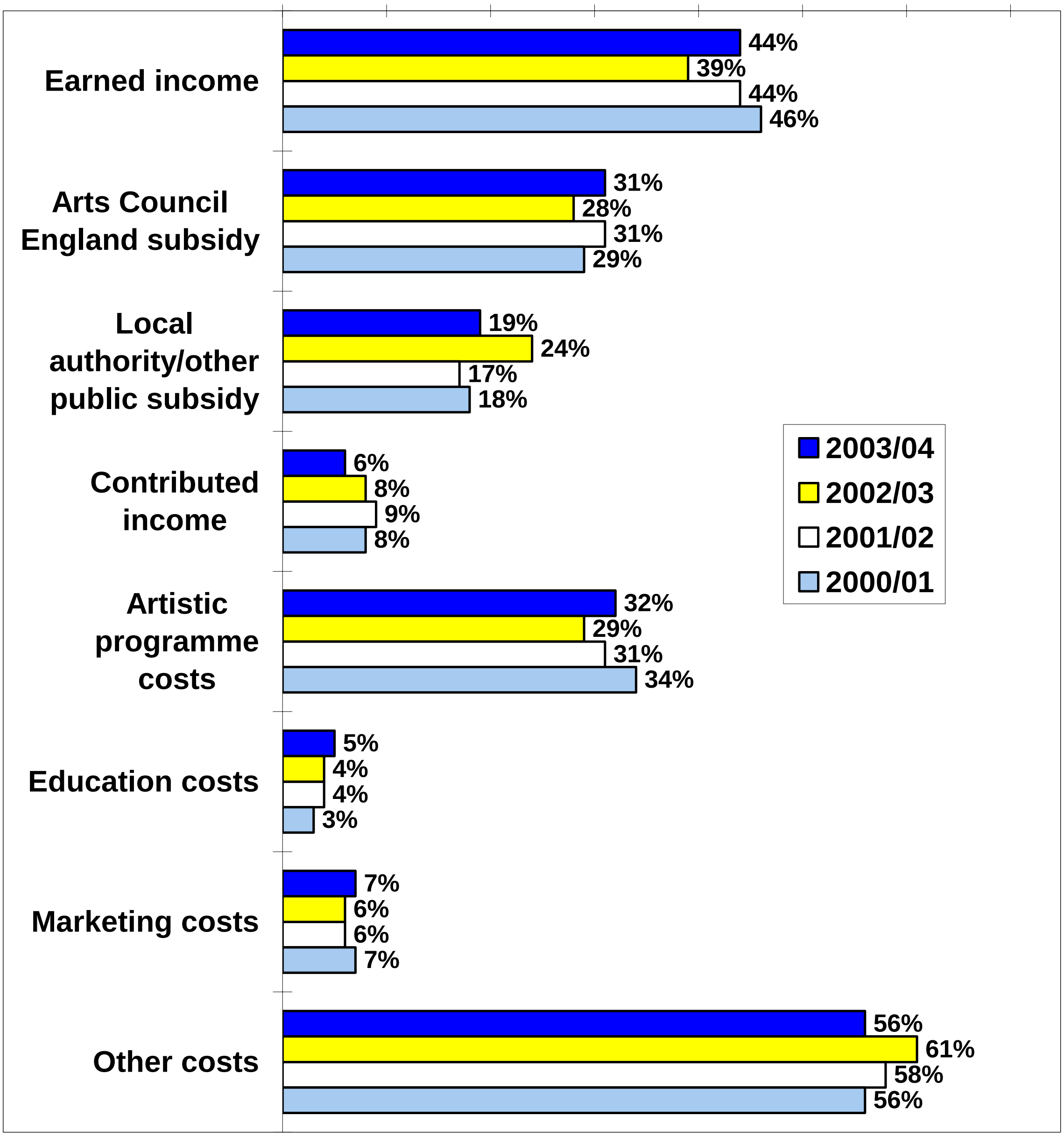


Chart 3 - Dance income and expenditure comparison

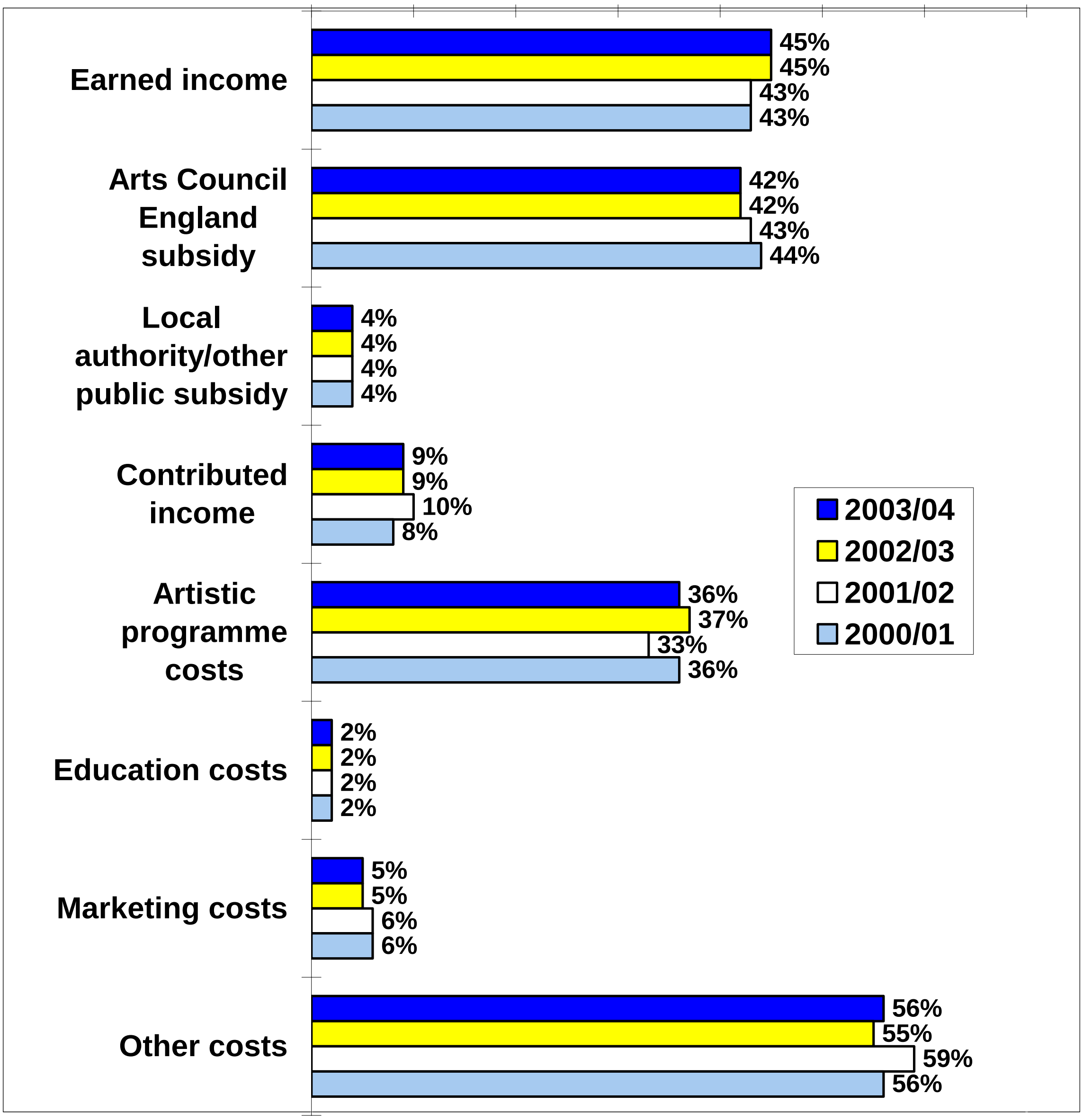


Chart 4 - Theatre income and expenditure comparison

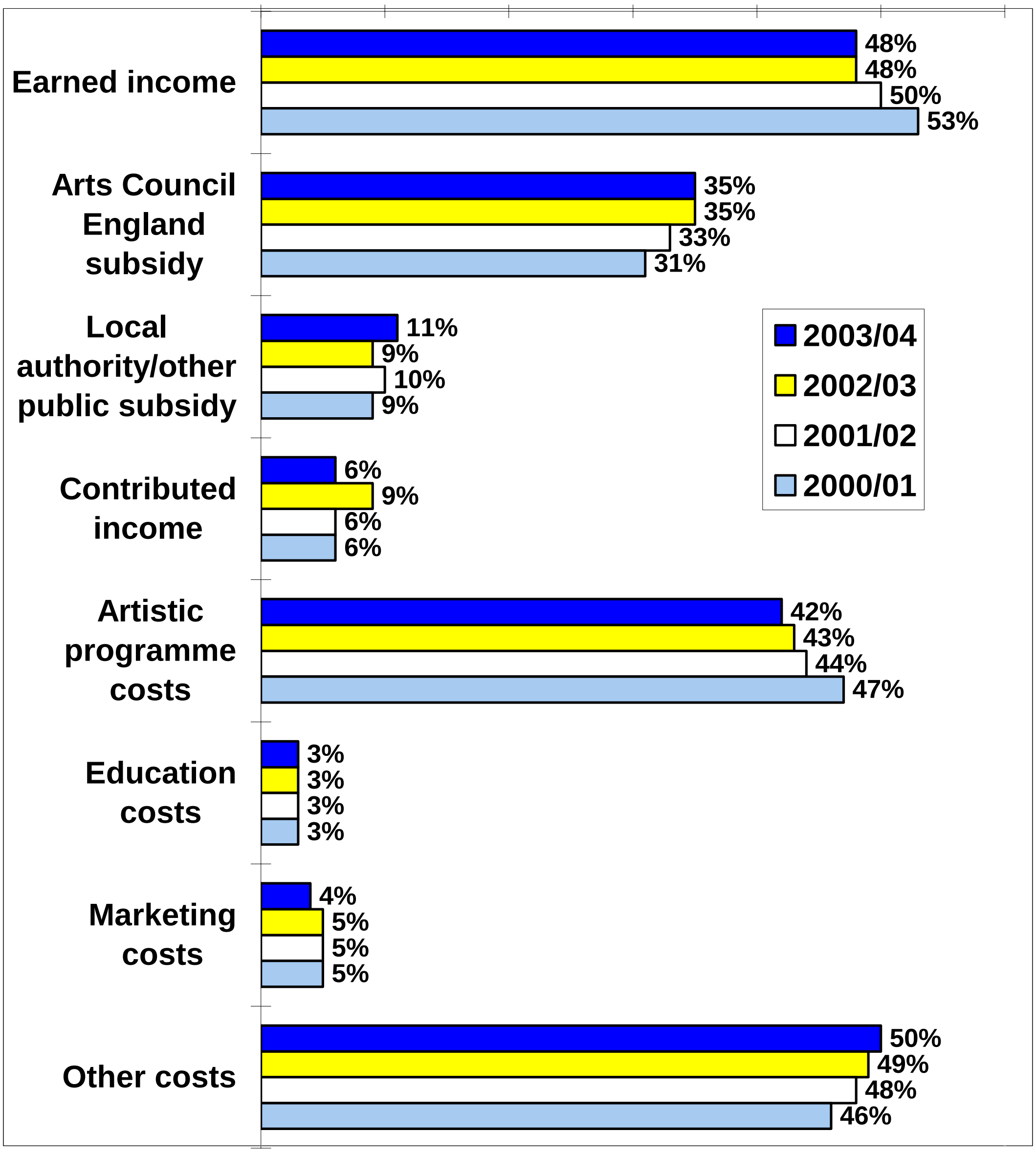


Chart 5 - Music income and expenditure comparison

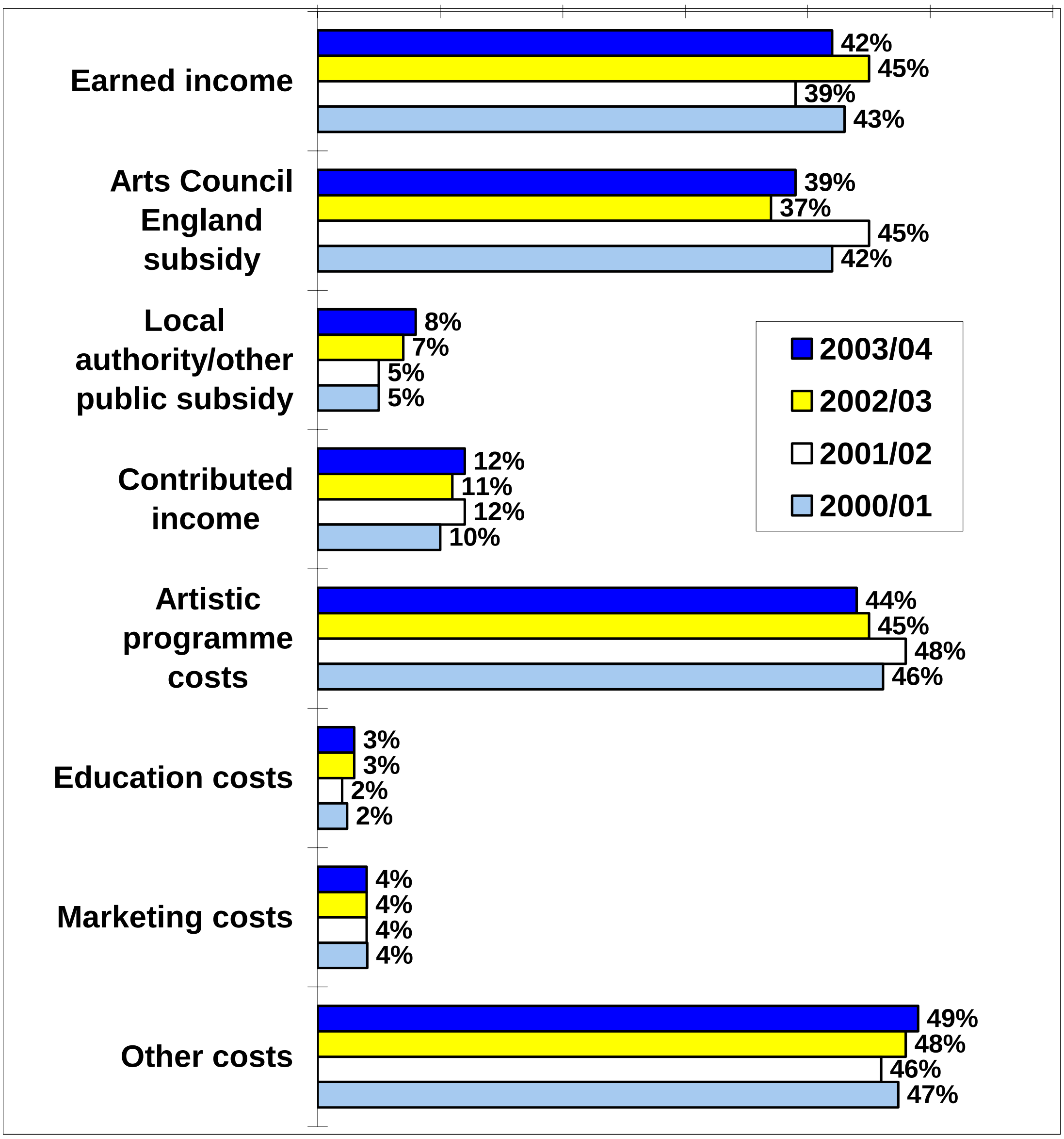


Chart 6 - Literature income and expenditure comparison

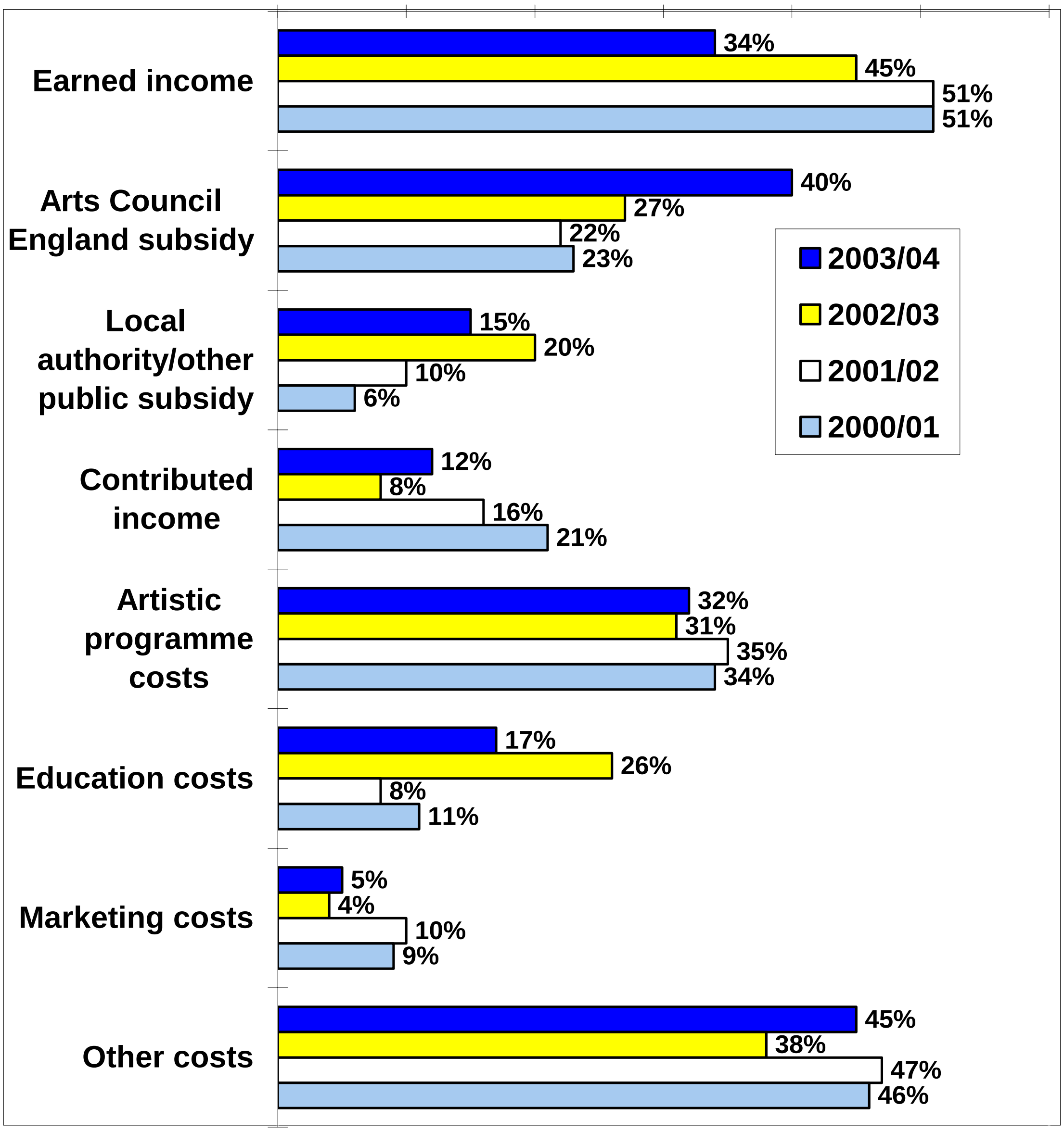


Chart 7 - Visual arts income and expenditure comparison

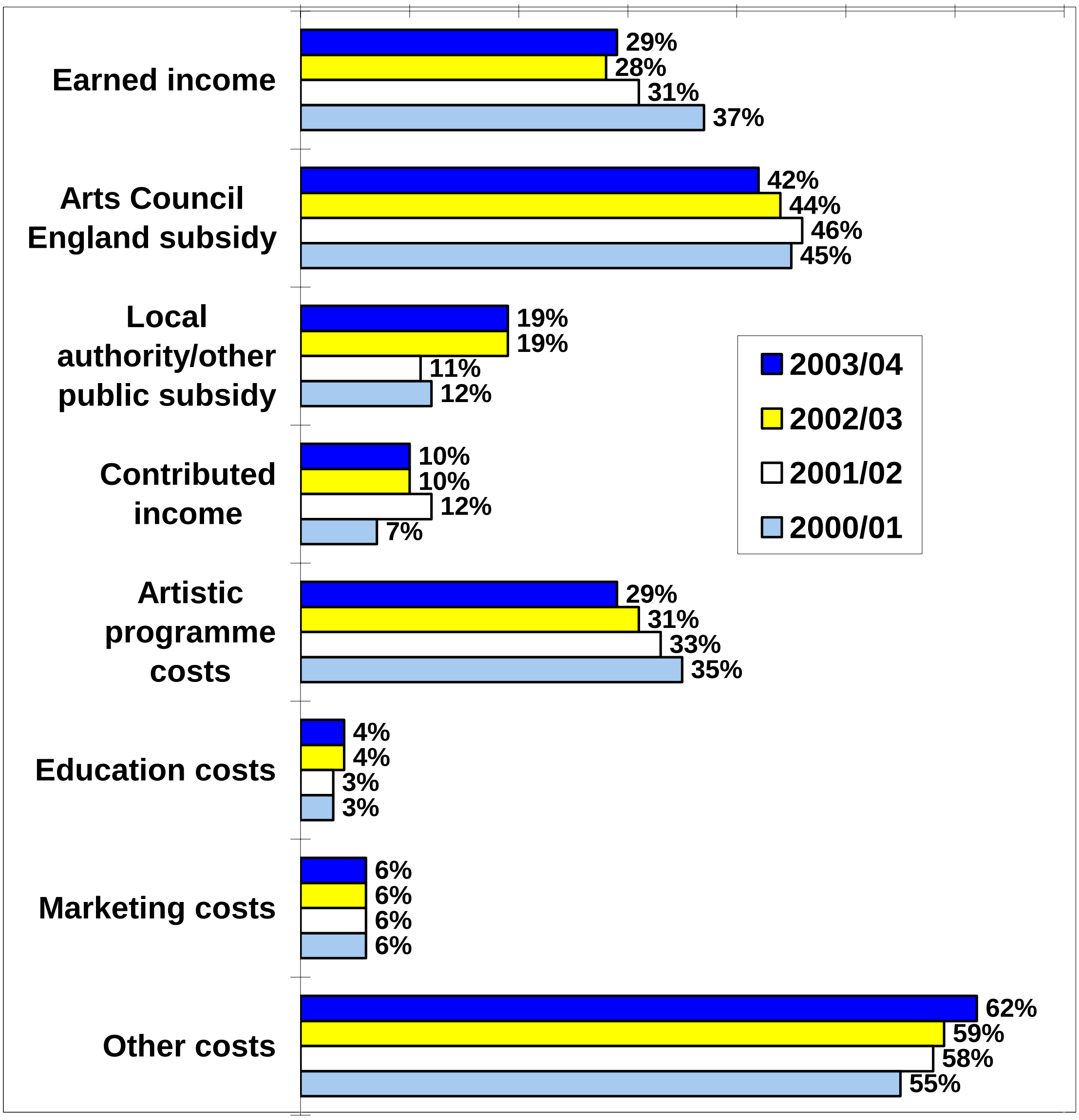
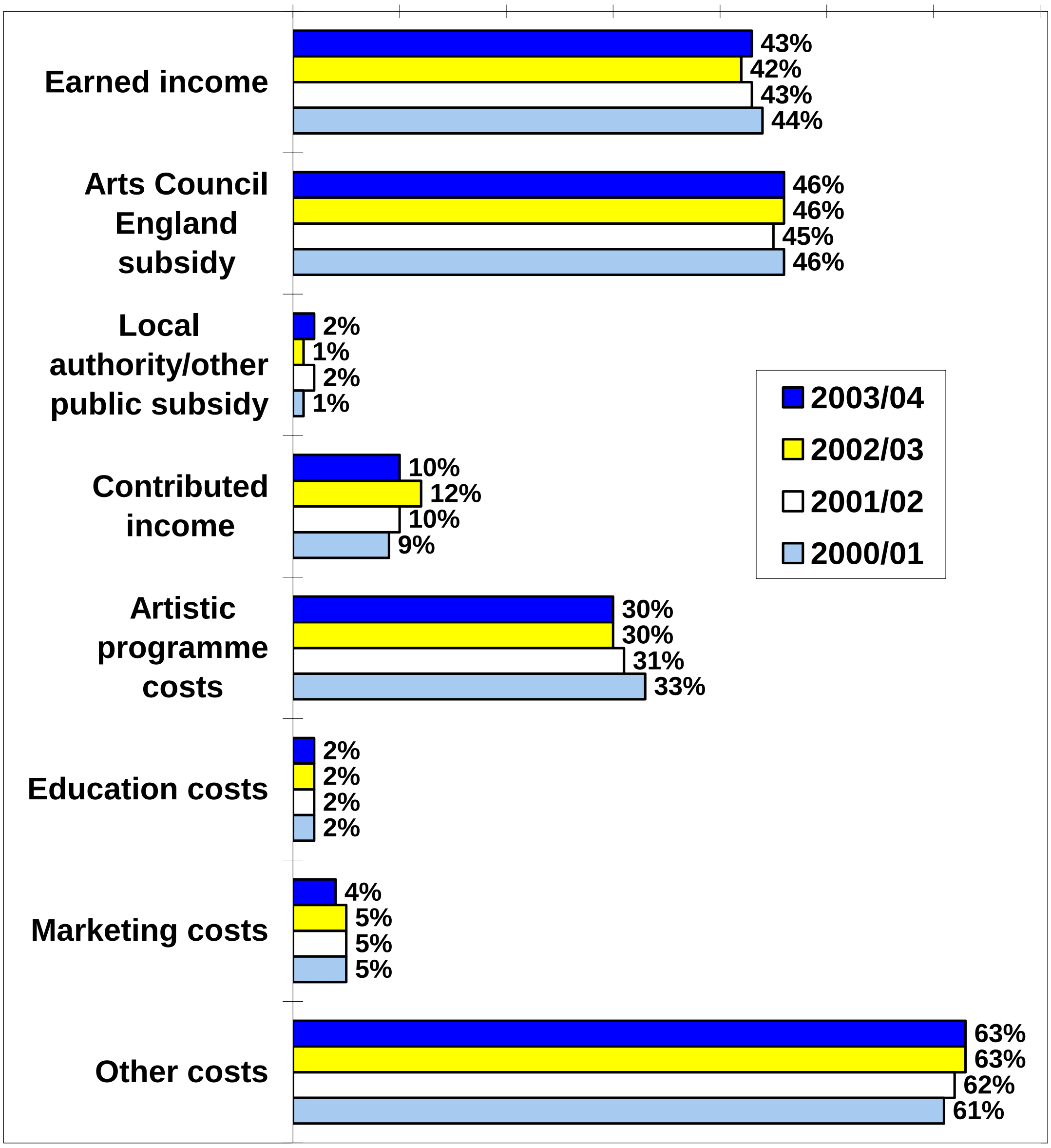


Chart 8 - National companies income and expenditure comparison



Arts Council England
14 Great Peter Street
London SW1P 3NQ

www.artscouncil.org.uk
Phone: 0845 300 6200
Email: enquiries@artscouncil.org.uk
Textphone: 020 7973 6564
Charity registration no 1036733

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