

*arts quarter*



Impacts of Brexit on the UK  
Arts Community:

Findings from Research  
conducted by Arts Quarter

October 2016

Arts Quarter LLP  
2 Raynsford Road  
Northampton NN5 7HP  
T: 01604 755760  
[www.artsquarter.co.uk](http://www.artsquarter.co.uk)  
Arts Quarter LLP is a limited liability partnership  
registered in England and Wales, no OC334140.

# Contents

	<u>Page</u>
<b>Introduction &amp; Methodology</b>	<b>3</b>
<b>Key Observations</b>	<b>4</b>
<b>Findings</b>	
Opportunities for Arts & Culture in a Post Brexit UK	7
Risks for Arts & Culture in a Post Brexit UK	12
Key Considerations for UK Government	21
Immediate Impacts of Private Sector Fundraising	27
Immediate Impacts on Earned Revenues	32
Further Thoughts on Brexit and the Arts	36
<b>Respondent Profile</b>	<b>41</b>
<b>Report Author: John Nicholls</b>	<b>43</b>
<b>Arts Quarter</b>	<b>44</b>
<b>Contact Details</b>	<b>46</b>

## Introduction & Methodology

Like many of our peers within the UK arts and cultural communities, we foresaw that the outcome of the UK referendum on continued membership of the European Union could be tight, but we, like many others woke up on the morning of 24<sup>th</sup> June to be surprised that the majority of those who had voted had decided in favour of the UK exiting the EU (Brexit). Over the ensuing week, many arts organisations with whom we have worked since our founding, contacted us to gauge our views on likely impacts on the UK arts and cultural communities. Our view was clear – wait and see – but as the volume of emails and calls continued to grow and anecdotal opinion began to mass, we determined that around a month from the date of the referendum, we might seek to invite the sector more widely to share its views and so we set about drafting an online survey to capture wider opinion. Alongside seeking to gather narrative viewpoints, we also drew on key elements of what has proved to be the highly effective data capture model which we established for our first Revenue Generation in the Arts Survey<sup>1</sup>. Including key questions from this earlier Survey has enabled us to gather hard data on the immediate impacts on private sector fundraising and earned revenues on the decision to Brexit, details of which are reported in full in this report, comparing like-for-like findings with those we collected at the end of last year for the same periods to demonstrate shifts in projections from across the sector.

This Arts Quarter online survey which captured information from across the UK arts sector was launched on 25<sup>th</sup> July and remained available for completion until 28<sup>th</sup> August 2016. The Survey was launched initially via email to Arts Quarter's own email list of 2,968 individuals working within the UK cultural sector. Invitations to take part were also distributed via Arts Quarter's own twitter feed and via a number of promotions on LinkedIn, targeted at senior arts professionals. Over the course of the 'live period', organisations were also re-prompted to take part periodically via email and across a number of these channels.

In all, some 464 completed responses were received, as well as 76 partial responses. For the purposes of reporting the findings of this Survey with a greater degree of clarity, we have restricted the sample to just one respondent per organisation, selecting the most senior individual identified within any one cultural organisation. This paring down of responses has left us with a sample of 408 individual cultural organisations, artists and practitioners from across the UK (having also excluded non-UK-based respondents). In a number of areas in this report, we refer back to and make comparisons with our Revenue Generation report from earlier this year. We feel comfortable making these comparisons in that 85% of the organisations taking part in this research project also took part in that earlier project, sharing like-for-like information on fundraising and earned revenues.

We are extremely grateful to all who took time out to take part in this Survey, many at short notice, and for the full and frank sharing of viewpoints which many respondents clearly took time to think about in great detail. We are also mindful that Arts Council England have undertaken a similar consultation process in recent weeks and we hope that the findings from our own study as outlined in this report will complement that work, mindful of the numbers of non-ACE-funded organisations who have taken part in our own consultation with the sector.

We have sought to include within this report and in full (while editing out any particular respondent references for the sake of anonymity) the viewpoints as shared with us as it is in doing so that we hope policy makers will gain a clear sense of the sentiments and needs of the sector around this important issue which will have an impact on the ways in which everyone in the arts and cultural sectors will work in the years ahead.

---

<sup>1</sup> Revenue Generation in the Arts 2015-16: Survey/ Report – February 2016 – Arts Quarter

## Key Observations

Even though we remain at the very early stages of the UK Government commencing the process of negotiating our exit from the European Union, feeling is exceptionally high throughout the UK arts community about the process and its potential impacts on the arts if a number of key considerations are not borne in mind by the UK negotiators. Our view was that the sooner the Government became aware of these key issues, the better, hence us undertaking this Survey in order to inform thinking at the earliest possible opportunity and in the hope that its findings might contribute to further sector-wide debate and enable the arts to build as strong a case as possible at the heart of the UK's negotiating position. It was for this reason that in seeking to gather views from as many arts professionals as possible, we adopted a more open form of questioning, allowing respondents to share their own concerns in as much detail as they wished, rather than providing proscribed options from which they could select the issues of greatest importance to them.

### Overview

When reporting the findings from our 2015-16 Revenue Generation in the Arts Survey<sup>2</sup> earlier this year, we reported in detail on a growing sense of optimism across the sector around growth in private sector giving, earned revenue development and a cautious sense of wider optimism among respondents in achieving their creative and wider organisational ambitions over the period to 2018. While many expressed unease around levels of potential cuts in local authority support for the arts, it seemed evident that over time any immediate losses could be recouped in the medium term through improved private sector fundraising, growth in earned revenues and other organisational development activities aimed at enhancing resilience. In the narrative responses to this latest Survey and in the immediate impacts of the Brexit vote on fundraising and earned income as reported here, that optimism has gone and been replaced by strongly-held concerns around the capacities of the arts to continue to thrive in a post-Brexit economy and in a wider society where public opinion has visibly shifted in some areas away from the core values of the sector. In this final respect, many of our respondents see the arts as playing a vital role in addressing many of the issues which came to the fore in the referendum campaign and vote; in the need for the arts to play a critical role in re-igniting the more tolerant and outward-looking values of UK society and in re-building community cohesion where it may have been damaged.

### Opportunities for Arts & Culture in a Post Brexit UK

Even though a sizeable number of respondents used this section of our questionnaire to state that they could not see any opportunities for the arts out of Brexit, others cited potential creative and business opportunities arising over time. Many talked about the potential for the arts community to develop programmes which might seek to build greater community cohesion notably within those areas and regions which may have been fractured by the referendum debate. Others talked about the potential to have relatively easier processes in place to engage with non-EU artists and collaborators and the potential to engage with a much broader pool of artistic practice which might equally shift perceptions within certain UK communities about engaging with the world. Some saw clear potential and value in opportunities which might arise from geographically more diverse partnerships and the benefits that could arise in the development of artistic practice. Many focused on the more commercial opportunities arising out of the drop in the value of sterling providing greater opportunities to present work overseas and from this, the potential to develop programmes in wider numbers of overseas territories. A number of respondents talked about opportunities to align the development of markets to tie in with emerging international trade partnerships, the opportunities for UK generated cultural outputs to exude 'soft power' in shifting perceptions of the UK around the world and the commercial benefits for the arts and the wider UK economy for the creative sectors to be placed at the forefront of the building of new dynamic relationships with new trading partners.

### Risks for Arts and Culture in a Post Brexit UK

The risks that might lie ahead for the UK arts community were clearly more evident in the minds of our respondents where a broad range of concerns were shared. Again these broke out into a number of key areas:

**Financial** – instability in the wider economy leading to falls in fundraising and earned revenues as businesses hold back from investing, consumer confidence falls away and the investment portfolios of grant makers are impacted by the falling value of the pound, cuts in interest rates and falling stock values. Increasing costs also featured significantly in respondents' thinking, especially in terms of buying in goods and services from overseas where the falling value of the pound would push up production costs when engaging with practitioners and suppliers outside of the UK. The most concerns were expressed around the loss of funding for the arts from current EU sources and the impact this could have

---

<sup>2</sup> Revenue Generation in the Arts 2015-16: Survey/ Report – February 2016 – Arts Quarter

On the capacities of the sector to continue to deliver significant projects. Equally, many identified the potential for there to be further cuts in UK government spending as the UK economy dipped in and out of recession and government having to respond with further cuts in arts funding to compensate for falling tax revenues.

**Collaborative and cross border working** – the loss of freedom of movement for practitioners to move and work across borders received the most mentions of all of the issues raised and the implications of the loss of this on programme development and delivery and in turn the impacts that the loss of collaborative pan-European working would have on operating models received the most mentions.

**Artistic** – many also talked of the loss of collaborative working affecting innovation and creativity and out of this, there being the potential for the arts to be impacted by a loss of ideas and wider creative thinking.

**Political** – the potential for parts of the UK, notably Scotland to seek to leave the Union, the implications this will have on arts organisations based in Scotland having access to UK-based funding sources and the wider impacts of this break-up on the UK economy and perceptions of the UK's place in the world affecting organisations in other parts of the UK was also cited.

## Key Considerations for UK Government Relating to Arts and Culture

Our questioning moved on to invite respondents to detail the key issues that they feel the UK government must seek to address in its negotiations with the EU to ensure that the UK arts and cultural communities are able to thrive. The issue featuring most of all in responses was retaining the right of free movement between the UK and the single market and secondly the rights of non-UK citizens from the EU living and working here currently to remain here. The retention of access to funding from those EU-based funding sources that are currently available to the arts also featured highly by way of key issues of importance to the sector or that new funding sources be established by UK government that would enable cross border collaboration to continue. There was a degree of realization by many respondents that in light of the wider public mood on freedom of movement, this may prove challenging for the UK government to retain and that the implications that loss of freedom of movement and loss of EU funding sources may have on the sector could be all but inevitable.

## Immediate Impacts of the Referendum Outcome on Private Sector Fundraising and Earned Revenue

In this section of our Survey, we invited respondents to share with us, detailed information about how they believe their fundraising activities will perform by this current financial year-end. Our questioning sought to follow a model that we first used in our Revenue Generation in the Arts Survey, the findings from which we published earlier this year and which are reported here again by way of comparison with these latest findings. With 85% of our respondents taking part in this and our Revenue Generation survey, we have been able to make some direct comparisons in the evolution of fundraising performance and highlight the impacts that respondents believe Brexit is having on their fundraised revenues in this current financial year.

Firstly, looking across the tabulated findings, when comparing our findings reported in February to the post Brexit position, there is a significant decline in projected growth reported across all areas fundraising activity, greater numbers of respondents reporting zero growth and indeed greater numbers of respondents projecting falls in revenues in many key areas compared to the projections made at the start of this financial year. No area of fundraising activity listed goes against this trend.

Based on these projected out-turns for this current financial year, we asked those taking part to look forward to their next financial year and predict how they believe their fundraising activities are likely to perform overall compared to this current financial year – taking into consideration the impacts of Brexit. Again our questioning followed the model we established as reported in February and with again 85% cross over in responses between the two surveys, the reductions in projected growth in fundraising revenues for next year as a consequence of Brexit are significant. Above all and in view of the current economic uncertainty, the number of respondents preferring to say that they are unsure or simply don't know what may happen next year has jumped substantially from 10.2% in February 2016 to now close to a quarter of respondents.

In the narrative contributions from respondents wishing to explain these shifts in projections, many re-iterated the financial implications of Brexit reported elsewhere in this narrative as being key considerations.

A similar model was shared by respondents reporting on shifts in projections on earned revenues post Brexit compared to February 2016 and again looking forward to the next financial year, the levels of projected growth in earned revenues shared by respondents earlier in the year have been replaced by higher numbers reporting no growth in earned revenues and no a fifth feeling unable to predict the future of earned revenues for next year compared to just over a 20<sup>th</sup> in February.

## Any Other Issues Relating to Arts & Culture and Brexit

We concluded our questioning by providing respondents with the opportunity to share any further views they may have formulated as they had been completing our Survey and many took the opportunity to share wider observations about the wider place of the arts in UK society as a consequence of the outcome of the recent referendum. Critically, the broad air of cautious optimism that we felt able to report around the future of arts and culture in the UK has all but disappeared and been replaced by apprehension and in some cases plain pessimism about the future of the sector.

Uncertainty reigns and the impacts that this will have on the capacities of individual organisations and the sector as a whole to sustain much fought for resilience look challenging at this time. Many respondents expressed concern that the arts may ultimately slip out of the minds of UK Government at a time when there are perceived to be many other priorities in need of addressing. This would clearly be a mistake given all that we know about the capacity of the arts to generate economic growth, societal cohesion and well-being and exude increasingly critical soft power around the world from which the UK economy can benefit.

## Conclusions

In looking at the findings from this Survey, we have been overwhelmed not only by the level of response to our call out to the sector to share views but by the strength of feeling that individual respondents have sought to share with us and with each other through our reporting of their views. We sincerely hope that policy and decision makers with direct responsibility for and capacities to influence the development of the UK's Brexit position will take heed.

In our Revenue Generation Survey findings, we reported on the extent to which arts organisations may be impacted by the then predicted cuts in local authority funding but there was comfort to be drawn in the majority of respondents at that time feeling that they may be able to shoulder those levied cuts through growth in earned and fundraised revenues over the medium term. With declining levels of growth and in some cases less revenue projected to be generated from philanthropic and earned revenues, for some organisations, the future may be looking concerning at a time when many are also entering into the next ACE NPO application round.

In 2012 at the Olympic and Paralympic Opening Ceremonies, we placed the arts at the heart of telling our story to the world. We did so in a way that led to a significant shift in perceptions of the UK as a cultural leader. Surely the time is right for us to seek to do the same again – placing arts and culture at the heart of our new vision for Britain in the world? To do this, the concerns and opportunities expressed in the viewpoints shared in this report should be studied in detail and integrated within the UK Government's approach not only to Brexit negotiations but in seeking to build a new place for the UK around the world.

## Opportunities for Arts & Culture in a Post-Brexit UK

### Q. What do you believe will be the greatest opportunities for your organisation in a post-Brexit UK?

*A lot of the work in the past has been about creating links between artists and arts organisations both here and Internationally. Projects that have had EU funding are fine for next 2 years but opportunities to further develop these effectively dead until alternative funding is found. European partners feel need to work with EU partners. UK no longer part of that stable.*

*As a community theatre company, anything that impacts on communities is of interest as source material for our work. We are based in, and work in areas of the country that voted 'Leave' and also that have benefitted from EU funding of various sorts. We work with children and young people in schools and encounter segregated communities of poverty. There are opportunities to work with them around friendship projects, skills-based projects and development education issues using the arts and creativity to forge empathy and imagination, especially around the plight of migrants from poor countries. There are chances to promote a kinder, fairer, nicer society - more equal and less exploitative of minorities and poor people. The opportunities are immense.*

*As an organisation with a long history of cross-border collaboration in Europe, I can't currently see any opportunities*

*As we do not know what form Brexit will take, I cannot comment on opportunities.*

*As we service the Commercial sector as well (West End) the increase in tourists due to the weak exchange rate could potentially benefit us indirectly – i.e. increased capacity leading to increased provision.*

*at present it's impossible to see any opportunities*

*At the moment I can't see any opportunities.*

*Brexit doesn't directly affect us as we are a British Festival which mostly support British artists and don't receive any European funding. The impact on us is indirectly negative. I don't really see any particular opportunities as a result though.*

*Bringing in artists from non-EU countries (because it will be seen as just as viable an option) may increase. A reduction in funding (if it happens) always forces you to be more creative.*

*Can't see the at the moment - except forcing us to be more actively involved in pan European projects. But early days...*

*Can't see what new opportunities will occur. Never actually got any European money, though we tried a couple of times. But we are very well linked internationally and I hope this will not cease.*

*Difficult to say*

*Don't see any particular advantage or increase in opportunities as we already partner with organisations in other parts of the world apart from Europe*

*Drop in sterling makes international touring easier.*

*Greater engagement with some of the poorer areas of our country and a turning away from the overfunded capital.*

*Hard to know. If Westminster were to recognise the value of the creative sector and commit to long term sustained support, that might offer security.*

*Hard to say. Might make UK a little more pro-active in getting out to other markets. Decrease in £ make UK work cheaper for international producers. Overall interest makes UK work interesting for international producers. All very ???*

*Hard to see any at the moment. It will depend on what policies government put in place to fill the gap after Brexit.*

*I can see none*

*I can't imagine any new opportunities have opened up. It may help shake up the market and open up new collaborative ways of working, but it feels like there has been enough shaking recently and we are already working very collaboratively.*

*I can't see any great positive opportunities at the moment, just risks and threats - see below. Our sector doesn't do a great deal of trade with non-EU countries but what there is at the moment - e.g. design work for countries in Asia - happens already and I can't see that growing significantly as a result of Brexit.*

*I can't see any opportunities.*

*I can't see any positive opportunities in this situation.*

*I can't see any.*

*I can't think of any.*

*I do not believe there will be any improved opportunities*

*I do not see there will be any immediate opportunities, only threats to partnerships, funding processes being more complicated,*

*I do not think it will provide any opportunities*

*I do not think there will be additional opportunities because of Brexit.*

*I don't believe that it offers any opportunities that are different from those that exist currently. There may be fewer in the future, but I see no prospect of increased opportunity for activity, trading or fundraising.*

*I don't see any specific opportunities post Brexit that weren't there pre Brexit*

*I don't see Brexit as bringing opportunity.*

*I don't think there are any I'm afraid*

*I don't think there will be any.*

*I don't think there will be many opportunities post-Brexit, as the funding streams will get tighter, and it will be harder to get work off the ground.*

*I remain unconvinced there will be any tangible benefits post-Brexit - we would have been making our own opportunities worldwide anyway.*

*I think there will be a shakeup in the network of systems that require EU funding. This will allow for new thinking of how we work together and allow for evolution.*

*If more future funding and decision making is available locally, this could be a big opportunity for us.*

*Impossible to tell because the nature of Brexit is unknown but likely to lead to raised transaction costs and a decline in overall activity, unless visa free travel for artists and performers is somehow made part of a new deal. There are no apparent upsides otherwise.*

*Impossible to think of any yet*

*Increased government support for development of cultural links with non-EU countries.*

*Increased tourism in London*

*It does not appear to create opportunities, as artists who were renting studios with us, are already planning to go back to their countries. It will create less diversity within the creative industries and this is a great loss*

*It is hard to see any benefits or new opportunities resulting from our exit from the EU. We would hope that those people who are shocked by the result of the vote may be more likely to become actively involved in the things they believe in - which can only be a good thing in local communities.*

*It is still unclear - possibly a little more cash to apply for, but somehow I doubt it - seems like a step back 40 years.*

*It will act as an impetus to be even more internationally engaged and cosmopolitan in our programming.*

*It's difficult to think of the opportunities at the moment - my view is that Brexit will be pretty catastrophic for the arts, and will certainly have a detrimental effect on my organisation.*

*Less people travelling abroad so increased domestic tourism - clutching at straws.*

*Maintaining international links both within Europe and outside of it, whilst also exploring what the results of the referendum mean for us in terms of our relationship with artists and our audiences.*

*More flexible working patterns and styles. More freelance opportunities.*

*More international touring because of the drop in sterling.*

*New markets such as South Africa*

*None/ No specific new opportunities post-Brexit (8 responses)*

*None, we already work with partners in the Caribbean, but cannot see any opportunities. The fact that this form is skewed towards ACE/ Local Authorities/ RFO's already excludes a SME like ours, yet we have a track record going back 30 years.*

*None. We are a small business and the bureaucratic costs (to us) exporting to Europe from outside the single market will increase our overall costs and damage us. The slide in the value of sterling won't help us sell more, but has increased our costs. Selling the art we produce to markets located far away will require very substantial investment and increased risk.*

*opportunities to continue to develop and grow collaborations with countries outside EU*

*Opportunities to critique this UK decision.*

*Opportunity to be even more innovative and creative in our artistic and financial strategies than we currently are: looking to maintain our European links, create new ones, and consolidate and strengthen those with wider world.*

*Our continuing commitment to use the arts for community cohesion and relationship building.*

*Our opportunities tend to be constant regardless of Brexit: we are keen to invite the best of UK and international puppetry professionals to our venue, and to participate in our professional development activities. There may be an opportunity if investment in infrastructure includes the arts, and investment in skills and young people includes cultural education such as we provide*

*Our responsibility to rethink how we engage with communities and help social cohesion through the arts*

*Our work is international and Brexit perhaps offers an opportunity to explore new markets aligned with the governments focus on new international trade partnerships.*

*Possible concentrated funding to develop our organisation further that may not have existed before.*

*Possible economic upturn easing pressure on public sector funding. V difficult to sustain a diverse arts offer in rural areas without subsidy. Possible more contact with wider artistic world - outside Europe?*

*Projects focused on cultural dialogue*

*Reduction in State Aid. Opportunities to strengthen ties outside Europe*

*Small work opportunities*

*Surprisingly, I have noticed more interest in UK as potential partners for projects and programmes by organisations based in EU countries. It seems not only is it important for UK to understand the reasons and consequences of voting Leave, other EU countries are also wanting to learn from us and also find & establish ways to retain/make relationships with the UK creative and cultural sector if we're not part of EU. This is probably the only opportunity I can currently think of right now.*

*Tackling the now flushed out racist overtones*

*The devalued GBP will perhaps lead to more international bookings.*

*The opportunity for the arts to work with young people over the next twenty years to explore what Britishness is and can mean. To help the next generations prize and enjoy traditional British values of tolerance, openness, acceptance of diversity, sanctuary for the dissident, internationalism in trade and exchange of ideas and culture as much as commerce; as an alternative to those values of exclusion, xenophobia, imperialism and militarism that were the cornerstone of large parts (but not all) of the Leave campaign. We can help our country avoid little-island and Merrie-Englanding our way to irrelevance.*

*The potential new links the UK government can forge with the Asian markets, as a big growth sector.*

*The unfolding situation could force us to respond fully to the wider changes politically, socially & culturally - rather than ignore*

*There are many, many exciting opportunities for our organisation on the horizon, but none which are enhanced (and many that are damaged) by an EU exit.*

*There will be more things to write about because of the unrest and distress caused by Brexit.*

*This is currently hard to articulate. Our community of practitioners has expressed the opinion that the outcome of the referendum is focusing their work and voices: enhancing a sense of community and creative identity that transcends national and cultural boundaries. The opportunity this represents is, perhaps, a better understanding by society at large of the value of the arts and creative sector in articulating a vision of a collective future that is more inclusive and more engaging for all.*

*This is difficult for us to answer as we are a membership, so what is of more relevance is what the opportunities and threats to our members are. I suppose the main opportunity is achieving the best possible outcome for our members.*

*To connect to Scotland and Liverpool and to become more political in our work. To demonstrate the importance of international working, multiculturalism and art-led social practice as a template for building cities and global economies.*

*To re-imagine new artistic and aesthetic narratives embracing a wider international global and local relationship without the superficial falsity of a European UNION identity and for artists to think beyond this veneer, which has cracked due to the democratic vote to leave the EU. There is the opportunity for artists to stop sneering at the demos and the demographic that voted Brexit. Artists need to decide on whose side are they on: that of the political elite and its bodies or that of the people and its aspirations for freedom and self-government.*

*To work more closely with my sector to share and support existing and new developments. To work with stakeholders/decision makers to find alternative ways of supporting the arts To work with artists and European partners to ensure there is the links and opportunities they need to make and show new work to new audiences To develop new partners beyond Europe.*

*too early to be sure of any opportunities that may arise. (5 responses)*

*We are a producing theatre. The opportunities from Brexit feel a bit tenuous at the moment. Much of our work reflects our local environment and should Brexit have wider socio-economic consequences - be they good, or bad - then these societal changes are likely to be reflected in the new work that we commission. It is difficult to easily see opportunities associated with what may be a calamitous decision, made in the interests of unity in one political party.*

*We are still reeling from the result, but are encouraged by the debate and growth in interest in European working and exchange. The vote has mobilised a younger generation and this can only be good. So far it is difficult to understand opportunities as we are still assessing what we will have lost.*

*We cannot currently identify potential new opportunities. (6 responses)*

*We do not really see any opportunities at present - except perhaps that the falling value of the pound might just lead to more international booking, although it too soon to say whether this will be the case or not.*

*We will continue to create work that involves and includes people and communities. Our location on the coast and only 30 minutes journey to France means we will endeavour to keep working and in contact with our French neighbours and the arts and commissioning community that exists there. It will be interesting to see if there might be more investment coming to the south east and if the Arts Council will support more NPOs in the region. As the UK map of Brexit voters overlaid over areas of low ACE investment makes for an interesting view of potentially how investment in culture enables the wider community to embrace a more liberal and tolerant stance.*

*Work with artists from outside Europe could possibly be easier but it's unlikely*

*Working world wide possibly*

## Risks for Arts & Culture in a Post-Brexit UK

### Q. What do you believe will be the greatest risks for your organisation in a post-Brexit UK?

*EU funding being a no-go.*

*- losing our EU artists if they feel unwelcome or have a change in residence status*

*- fewer collaborations enriching our cultural activities*

*- limitation on touring and bringing work to the UK.*

*"Little island syndrome" - isolation from existing and potential European and wider international partners. Specifically, our plans for large-scale Creative Europe cooperation project.*

*A period of insecurity*

*A shrinking national economy leading to lower investment in statutory arts funding bodies, e.g., Arts Council England; also cross-national collaborations benefitting from EU funding.*

*A shrinking of potential audience and funding streams from Europe. Additional costs of importing/ commissioning international artists and performers, burden of paperwork, lack of goodwill towards UK collaborations from EU partners, lost research funding (we are a university funded arts centre).*

*Adverse impact on economy impacting on ticket sales and funding. Significant loss of range of cultural influences on artistic activity, including difficulty in including international work in programme. Loss of access to EU funding.*

*An economic downturn.*

*As a creative sector agency based in Cornwall we have benefitted hugely from EU investment - both revenue and capital - over the past 20 years or so and I don't see this being replaced by UK central government. One of the great positive aspects of the EU for us was its support for peripheral regions in contrast to successive UK governments. Our capital programme is on hold - we completed a £3.5 million scheme in 2015 and had planned phases 2 and 3 for similar sums over the next 3-5 years but I can't see how this will be possible without EU investment at about 50% of cost. In revenue terms, we are just getting final approval for a £3.6 million ERDF / ESF / Arts Council / Cornwall Council skills and business sector support programme of which £3 million is EU funds. We expect this to continue to 2019 but clearly there's a risk that it won't carry on for the full term and it's too early to know what might replace it.*

*As a non-executive director for a limited company, the only risk I perceive is that the UK cultural scene \*may\* have become so dependent on EU funds (rather like developing or third world nations are with foreign aid), that artists cannot think outwith the EU framework and operate financially and artistically. However, great art was produced without the financial and cultural diktats of EU funds.*

*As a small organisation, we do not have too much to lose, so we do not envisage that this will be a problem. The problem is more like the Jurassic Park story, where the small dinosaurs are munching away and then the big ones take over, smashing everything in their way to save themselves.*

*As the local authority is our largest funder it will depend on continued pressures on the public sector, and particularly on local authorities. An economic downturn makes more cuts more likely I guess. But we are already threatened with being outsourced to a "more commercial operator", before Brexit.*

*Audiences ability to spend - and their willingness to book in advance given economic uncertainties. As we lurch to the right, will governments remain as committed to supporting the arts? Stronger collaborations between EU nations, excluding UK. If the economy continues to stall, what further austerity measures will be imposed on local authorities*

*Both our County (Cornwall) and the creative sector are reliant on European support, both financial and as creative partners. We are anxious that LEP, European infrastructural funds etc will disappear without Westminster replacement funds threatening a growing and important but vulnerable creative sector. We have accessed European cultural funds in the past, and cultural funds from particular countries that may no longer be available. Creative partnerships with European organisations and artists look more fragile.*

*Combined Arts delivery in public realm is too often an after-thought and seen as a luxury to have if there is any money left. As organisations fire fight during massive change it is likely that the spend will reduce even further.*

*Could be more challenging to organise and fund international partnership projects.*

*Cross European collaborations with artists. Falling value of the pound (a core member of staff lives in Brussels and so her wages have diminished by £400 per month due to the financial instability). International relationships in general*

*Decline in funding in the UK due to organisations acting cautiously with budgets. Opportunities to raise money through European funding decreases*

*Decreased government support for development of cultural links with EU countries.*

*Depending on what form Brexit takes, we have concerns over whether artists will need work permits or a visa to work with us. Any European collaboration, such as co-productions or tours, will require careful thought in case of additional costs due to tariffs etc, as well as additional time for physically moving any set etc, across borders. Funding pathways may also be cut off if they are reliant on EU membership. Overall, the question of funding via the Arts Council as a result of government fiscal policy is a big question mark with the risk of further cuts to any budgets.*

*Diminished artist mobility because of revised immigration and visa regulations meaning reduced access to the best international performers. Potential reduction in touring opportunities within EU countries. Decreased access to European co-production funding, a vital part of our financial model for new productions. Worries about existing London-based European staff and their employment status. The potential for significantly increased bureaucracy in relation to European touring e.g. visas, taxation, reciprocal health care leading to increased administrative costs. Decreased artistic exchange limiting access to inspiring creative work from across the continent. The potential impact on European IP legislation and copyright law.*

*EU Culture fund loss - partners in EU not willing to work with UK companies.*

*European partnerships built so far threatened. Project delivery and involvement in these now very limited.*

*Failing economy*

*Fewer funding opportunities. A reduction in the power of UK's 'cultural capitol' around the world- it may take us years to shake off the stigma of being a close minded bigoted behind the times country that does not like foreigners. Loss of freedom of movement will make European touring much harder, and harder to recruit the talent we need from outside the UK. More economic hard times will mean further reductions in already over-pressed ACE funding.*

*Financial instability. Lack of European Commission funding. Restrictions on travel/visas for international collaborators. Rising living costs for members of staff who live in Europe due to the falling pound. Funding is the major risk - Loss of European funding and a potential contraction in funding for the arts. We are not only able to seek support through EU Cultural Funds but also from EU Cultural organisations and Foundations, who may be much less inclined to support UK organisations. There is a distinct possibility that Scotland will break away from the UK and this will mean a lack of funding opportunities for Scottish organisations. Costs of buying in services and working internationally - Due to the decline in publishing and printing in the UK we have been working with European printers, the costs of this increased by around 1/3 the day after the Referendum. The cost of travel to and from the UK will potentially increase meaning that our research travel will be curtailed and bringing artists to Scotland more expensive and therefore a luxury. It is an important element of our programme that artists come here and are supported to experiment and take risks, if it becomes prohibitively expensive and difficult to bring artists and art here, it will affect the quality of visual art in Scotland. Freedom of movement is a major risk, this would make working with artists and potentially shipping artworks much more prohibitive.*

*I think the most uncertain areas are around working in Europe and employing people from Europe to work in the UK. We regularly work in France and we also have European artists come to the UK to work with us. The relationships are fruitful and bring a great deal to communities on both sides of the Channel. European funding is also an area of uncertainty, as we have previously been recipients of EU support through Interreg and through direct commissions from local authorities in France and we have no clear idea of what the situation will be in the future and if it will be at all possible to apply for funding and work in partnership with others in Europe.*

*If UK leaves the single market, there is a genuine threat to our members of attracting the best talent to the UK, and a threat to their touring model. And any threat to our members' financial sustainability is a threat to us.*

*If we have a weaker economy, there will be less money to spend on the arts - at the national right down to the individual level.*

*If we wish to work with artists and organisations based in European countries, we are not sure who will meet the cost of the visas. There will be fewer opportunities for artists to have easy and affordable access to each other's work and work together.*

*Impact of recession on all income streams. Uncertainty among potential donors. Impact of exchange rate fluctuations on international artist fees. Potential for new tariffs on digital exports*

*Impact on orchestras due to loss of European tour revenue, greater pressure on orchestral*

*Impact on trusts and foundations. Impact on capital development. Reduction in regional investment. Impact on wider economy. Reduction in partnership and collaboration. Reduction in import and export of work.*

*Impact on voluntary and academic placement links with European students and other exchange schemes. Impact on future cross border collaborations and projects - particularly in respect of funding for project development and application.*

*Impossible to get international (pan-EU) funding, increase in competition for UK funding.*

*In the event of economic down turn they will be greater competition for funding. For example, the recent reduction in Bank of England base rate will reduce the income of Trusts and Foundations, making them even more over-subscribed than they are already. The negotiations to leave the EU will take many years and a correspondingly large amount of government capacity will be used in the negotiations. The arts are still waiting to have their funding fully restored following the 2012 Olympics, and with more demand on resources this becomes increasingly unlikely. We are also extremely concerned about the fracturing of society in Britain, with many rural and small town communities voting in favour of exit.*

*Increased competition for private, public and lottery funds due to other organisations having lost their EU funding. Squeeze on individual finances negatively affecting our revenue streams and individual giving schemes. Negative impacts on international staff members, visitors/tourism from abroad and incoming international artists or tours.*

*Increases in student fees. Nervousness for EU students to study in the UK*

*Indirectly, as a small niche festival, our larger and more established competitor had positioned themselves as the international org, receiving a collaborative EU grant. They are also an NPO and we aren't. Given EU funding won't be open to them, I would expect them to reposition themselves to working more in our arena in the UK with UK artists and that is the biggest impact that I would expect for us. We will need to maintain our edge and continue to innovate in order to compete. Brexit is terrible for artists as it may impede British artists from being able to tour to Europe (which may mean that some small organisations can no longer find a workable viable financial model which has a longer term impact on UK promoters) and from European artists wanting to tour to the UK.*

*Isolation. The vision of UK that others have abroad is likely to be increasingly negative and not reflective of our reality.*

*It depends how employment practices develop but recruiting internationally is important for us.*

*Lack of diversity and innovative ideas through cross cultural referencing.*

*Lack of freedom of movement- for employment of talent and for touring. Recession and low economy and thus cuts to all funding. Pull in of thinking and proliferation of small minded right wing thinking thus less experimental arts. Less commissions. Theatres closing.*

*Lack of opportunity with EU countries*

*Less funding available to organisations to employ freelancers on short term projects.*

*Less funding for the arts.*

*Less opportunity for trust and foundation fundraising due to less funds available due to the predicted economic downturn. Questions over funding of the Arts Council and how much the government will cut from the Arts Council's budget and the knock on impact of this.*

*Less protection for human rights.*

*Likely loss of EU funding*

*Little Britain mentality, less European exchanges, less opportunities to travel.*

*Loss of contact with colleagues through collaborative projects across Europe. Loss of funding support from EU. A loss of political solidarity with organisations and networks across Europe.*

*Loss of ERDF to the North. Loss of graduate opportunities funded by ERDF and similar. Loss of regular European cultural exchange. Loss of Erasmus. Lack of confidence and interest in the UK. Rising costs due to unstable economy and fluctuating exchange rates. Recession*

*Loss of EU funding - we are involved currently in 3 different EU funded projects. Loss of any possible future ERDF capital funding - we received funding for our building in 2000. Fewer opportunities to tour our arts projects to other EU countries because of financial and logistical barriers. Difficulties employing staff from other EU countries. Difficulties collaborating with arts organisations in other EU countries. Isolation artistically and culturally.*

*Loss of EU funding opportunities; inability to access pan-European projects eg Creative Europe; loss of freedom of movement for artists; inability to access pan-European research opportunities*

*Loss of EU funding opportunities. It being harder / more expensive to bring in EU based artists.*

*Loss of funding opportunities in Europe, fewer European partners willing to engage with us, less funding in general due to economic slowdown, recession impacting discretionary sales, more need in the local community due to less work available, changes in legislation requiring more training on operational matters (HR, Finance etc). Unfavourable exchange rates meaning that it isn't cost effective to tour international work.*

*Loss of funding opportunities via Creative Europe. Loss of networking opportunities and projects as a result. Increased administration and paperwork and costs in terms of visas, work permits, international travel etc.*

*Loss of income. We have had more courses cancelled since the referendum than ever before in a 30- year history. This company was four times as big prior to the recession of 2007. We had just fought our way back to a position from which to grow again ... We believe that training (our main earned income generator) is temporarily over. We have to find new ways to make a contribution and earn income. This will - suddenly - be a year of re-thinking and regrouping. Again. We have to develop a new way forward. The other big issue is working out what our place is post Brexit. Given that many things about British society have been revealed, the role of artists in this divided culture need rethinking. We have always worked in disadvantaged communities. But we are also perceived as part of the the 'islington cafe set' i.e. privileged educated, middle class artists. We are debating our role afresh therefore ....*

*loss of opportunity for a range of EU funding. Indirectly but probably more importantly the impact on the economy limiting our future sponsors and level of commercial support. certainly a period of uncertainty will see firms becoming more cautious about investing in sponsorship or in undertaking activities like conference/venue hire/function hire etc which will impact on our bottom line.*

*Loss of potential funding*

*Loss of some excellent staff and freelancers. More difficult to work with European artists for projects and collaborations. Difficulties bringing European dance companies to UK. Loss of access to European funding.*

*Moribund economy. Increased cost of international work. Lack of arts knowledge and experience among newly appointed politicians. The arts and creative industries being sidelined by bigger problems*

*Musicians unable to enter UK*

*No access to EU Arts Funding. No access to EU Youth and Education Funding. No Access to EU HE projects and partnerships.*

*Increased paperwork/costs in exporting to EU countries. Decline in EU exports due to exchange rate. Increased costs in working in US (due to exchange rate)*

*None of us know where we will be in 12 months and what kind of deals we can negotiate. But we do know there is a great deal to lose and as the rawness wears off we must try to salvage what we can of what we had. So many of our cultural institutions and universities will be impacted, particularly in our region. Specifically, for us, the risks are as follows: 1. We have to repair the damage done to our reputation as a UK organisation. 2. We have to now fight twice as hard to be heard as an equal partner for roads we are planning to travel together. 3. We need to reassure artists, partners and colleagues travelling in an out of our programmes that at least for the present nothing changes. Given a choice, other EU partners, artists might be perceived to be less of a risk. 4. We employ graduates with Erasmus experience - both coming into the UK and our students who have gone out. The closing of these opportunities makes our country that little bit smaller, less able to understand the world around us. 5. Creative Europe - we are current recipients of Creative Europe programmes and planning new ones. These are at risk. 6. Our organisation has benefitted from devolved structural funds- these are at risk. 7. Other transnational programmes are also at risk. 8. So much of my time these past 4 weeks has been spent reassuring our European colleagues of our commitment to collaboration, and reassuring our local partners, communities and artists that our funding for UK activity remains in place for now. The damage is financial, emotional and structural.*

*Opportunities to take part in European collaborative projects becoming less forthcoming. Potential limits on or bureaucratic barriers to hiring artists and performers with European passports would reduce the pool of people we work with regularly as trainers, practitioners, workshop leaders and performers. Worse still, visa restrictions or administrative and bureaucratic barriers on UK citizens working in Europe could restrict our ability to take our productions overseas, at a time when this revenue is crucially important and only going to increase in business relevance as subsidy tightens and the pressure to generate revenue from other sources grows.*

*Our greatest risks are access to financial support for core costs. We did not receive this from EU. There is a massive risk to us if the UK economy goes into recession and charitable trusts and foundations yield on their investments is reduced as in 2008-2011, in parallel with increasing demands on public and lottery funding. We fear away-based artists will find it less attractive to participate in our programmes, certainly when Brexit is enacted if not in the run up to it Private sector investment in the arts (charitable grants and sponsorship) may be negatively affected if there is a continued loss in business confidence.*

*Our organisation offers formal education and qualifications, with a small but important number of students coming from EU countries. They do so with relative ease - compared to Tier 4 sponsorship of non-EU students - and the potential for reduced numbers coming into the UK following the imposition of greater barriers to travel (which seems to have been the primary aim of most people who voted to Leave) will have a significant impact on us artistically and financially. Similarly, our programming of activity and performances includes bringing artists in from Europe to present work that may not otherwise be experienced in this part of the world. Making this more difficult or expensive will diminish our artistic and financial sustainability. We have benefited from European funds in the past, although we are not in receipt of any at the present time. Clearly, it is unlikely that we will be able to access such funding in the future.*

*Possibly not being able to recruit from the EU.*

*Potential loss of EU funding leading to potential decrease in project and ACE funding. Loss of freedom of movement of people and circulation of goods. Additional VAT.*

*Raised transaction costs in the form of admin load if elaborate and expensive visa schemes, like those in place for the wider world, are extended to EU citizens. A likely decline in activity (demand for theatre space) resulting from London's loss of position as a European cultural supercluster. A swing away from the current innovation at grass-roots level reflected in our business as young Brits and Europeans de-populate London creative industries in favour of Berlin, Paris and Amsterdam. Contracting artistic policy: currently assuming easy cross-border flows of people, ideas and audiences. A decline in our European language programming and nationality-specific festivals (Spanish, Romanian, French etc) An emphasis on mass market products or events with international appeal - for example to Asian audiences. But this will mean competing with the high production values of much larger venues.*

*Recession and therefore less funding available through trusts, foundations, individuals and from the arts council themselves. Because of the recession, further cuts to the social welfare which would mean further reduction in people with learning disabilities' individual budget. There is also an insecurity amongst our artists, staff members and volunteers from EU countries about what is going to happen to them, what rights will they have after Brexit.*

*Recession, and knock-on impact on arts funding (via government grant in aid, pressure on lottery funds, intensified competition for private funding from individuals and foundations). Visa requirements for guest artists likely to increase in number, bureaucracy and or cost (e.g. currently we don't need any for European guest artists). There is already a perception of the UK dance scene as 'behind the times' - this will likely reduce opportunities for exchange. Impact on Higher Education partners - we deliver HE modules for universities, and they have noticed that potential students from Europe are reluctant to study in the UK post-Brexit, reducing income and the breadth of artists to work with. I also have a concern (though aware of limited understanding) that the government will have to replace lost EU funding, which will presumably a) be a drain on the funds it has available and b) require resources to allocate, administer and monitor these funds, all amounting to a further strain on the overall budget. Also concerned that in the long term, Scotland might secede and England will be voting Conservative for the rest of time, and appoint ministers who wish to dismantle institutions (BBC, ACE) and entrench class distinctions, which impact on cultural participation.*

*Reduction in funding opportunities (both European-source funding and reduction in grant giving capability of UK based funders, due to volatility in the investment market). Possible implications for eligibility to bid for European Capital of Culture in 2023. Possible reduction in touring exhibition opportunities.*

*Reduction in research funding with university partners. Reduction in opportunities to tour internationally, particularly through our EU partnership promoting theatre for early years. Reduced access to EU funding (ours and for areas of deprivation in our region). Visa issues bringing international companies to our festival. Reduction in funding for international collaborations. Reduced opportunities and invitations to visit international festivals (including visa costs etc). Recession.*

*Restricted access to European funding and therefore inclusion in pan-European partnerships. The consequence of Trusts and Foundations being hit by even lower or negative interest rates - at a time when our organisation was beginning to see significant increase in income from this are. Increase in costs of bringing artists and work from Europe for distribution here in the UK (costs of importing the work & difficulties artists may face if freedom of movement curtailed). Further cuts to local authority budgets will exacerbate an already difficult local situation with many voluntary sector organisations that we work with having to close their services. Increase in racism and nationalistic tendencies make the people we work with even more vulnerable. European students have been vital to keep applied arts courses going - these will be under threat if numbers reduce.*

*Restrictions on touring both directions. Budget cuts. General economic turmoil. Hideous ideological turmoil particularly xenophobia*

*Distrust from EU partners about project status and commitment.*

*So far the whole situation is such a mess with absolutely no-one having any ideas what may happen we are at a loss even to speculate, however we can be sure that our very close association with our partners in the EU will not be enhanced, nor will it help the trans Europe cultural projects that were beginning to take off. We are fearful that certain grants from different countries may be more difficult to obtain or, heaven forgive, the conditions will get even more severe making application all but impossible to fathom or obtain. We are particularly fearful that the work we have done over the years will be harmed as the European Culture grants, specifically for the smaller languages, may be adversely affected. If this should happen our country's wading into Brexit will never be forgiven and England will always be held responsible for the most ignorant decision, led by a group of wholly ill-informed failed politicians.*

*Specifically, the puppetry community in the UK is concerned about the potential impact on their international touring work (many rely on this as a significant part of their income). They are concerned by restrictions to freedom of movement, depreciation in the currency (potential short term benefit) and resulting increase in the cost of living. International practitioners living in the UK feel themselves to be no longer welcome and at least one - who has lived here for over 15 years - is questioning whether she wants to remain. Producers and promoters are concerned by the depreciation in the currency, making the programming of international work more costly and also by any potential restrictions to the freedom of movement and the cost implications of tighter border controls. There are also specific concerns about loss of funding and partners in Europe due to Brexit on projects which are valuable and enhancing to the UK. Collectively, there is a concern about the potential breakdown of the international artistic/cultural exchange (which is a multi-layered and complex phenomenon across our society). this exchange is invaluable to artists and our society as a whole. To lose this would make British culture and society poorer.*

*That the cultural/Political landscape of Britain has shifted regarding diversity and what it is to be British and make work in a 21st Century Multicultural Britain.*

*We will isolate ourselves, both culturally - and in terms of funding. Our perception in Europe will be destroyed, and the links between countries will deteriorate. Brand British shall be a smaller brand, and we will seem irrelevant on the world stage.*

*The Arts in the UK becoming insular and no longer part of an exciting European community.*

*The closure of EU funding streams will mean more organisations are competing for other funding sources. Low interest rates mean trusts and foundations have fewer funds to distribute. Working internationally will become more of an issue and we employ quite a few European workers. The rights and independences of deaf and disabled people are already at risk through austerity measures. Without the support of European employment legislation these will be further eroded. The post-Brexit climate does not seem to be one of tolerance and inclusivity - the effects on our organisation will be stark.*

*The greatest risks would be to the funding that supports the art organisations that we depend upon to do our work - as a Magazine, we need exhibitions to review, a thriving culture upon which to comment. As an academic publisher, the greatest risk will be cuts to funding in the UK that allow such work to be published, but also, as we depend on the collaboration of International scholars, the willingness of foreign funding bodies to support work in the UK post-Brexit.*

*The loss of EU funding will have a direct impact on the availability of funding from other sources, which will now become more competitive. We are also aware that the ecology of presenting and making work is likely to become less diverse. Previously thanks to the free movement of EU nationals, touring work and artist exchange between EU countries has been much easier.*

*The main risks relate to our ability to use the artists we wish to work with (mostly from the EU) without increased costs and time and for us to be able to access EU markets without increased administrative time. There is also a risk of becoming UK centric in terms of cultural presence/partnership which is not artistically healthy.*

*The money, obviously and the pervasive depressing climate. The possibility of negative growth or recession - less money collected in lottery tickets, taxes and business rates will mean less money for arts projects. Fewer people choosing arts as a career mean difficulty in recruiting high calibre staff.*

*The rise of fascist and racist tendencies, a promotion of closed societies. Detrimental labour laws and pay rates for workers. Less global and intercontinental cooperation and inability to share different practices and methodologies.*

*The uncertainty of the situation especially in relation to trusts and foundations who's income could be potentially slashed through the stock markets and financial institutions caution and lowering of interest rates, reducing funding pots. Home grown audiences caution at spending on 'leisure / luxury' items therefore reducing venues income and therefore impacting on bookings for us. The demise of subsidised arts - what is going to happen to ACE / DCMS long term?! Reduction in EU funding for projects - i.e. we aren't eligible anymore. Both directly and indirectly affecting income.*

*The government will have its revenue squeezed and there will be less for the arts*

*This will severely damage my abilities to lecture and therefore promote my organisation in EU countries. Additionally it will prevent my access to EU funding as well as fundraising via art/edition sales to collectors/patrons who are on the small-scale like our organisation and thus will be less likely to buy art/editions if they have to pay customs for shipping.*

*Too expensive or restrictive to work with European artists and artwork. Arts funding cut due to economic crisis. industry affected by less disposable income. Council budget cuts leading to job risk. fewer jobs in the sector than there already are, meaning that you are stuck.*

*Touring plays a major role in our organisation. Having free movement in Europe is essential for our work and I can only see this avenue becoming more difficult to work in, particularly if we have to apply for carnets every time we take shows out of the UK.*

*Uncertainty as some projects in late stages of development are reliant on funding from ESIF.*

*Unstable economy making forecasting impossible. Lack of EU finance for regeneration or capital projects. Restriction of touring in work from EU artists or touring work out to them. Unable to attract top talent in arts administration and leadership.*

*We are an international company so any restriction of movement of artists would reduce the diversity and multi-cultural impact of our work.*

*We are concerned that Brexit will lead to an economic slow-down in our economy, nationally, regionally and locally. The town in which we are based has traditionally been a low wage, relatively low-skilled economy. Our customers are very price sensitive, as we discovered in 2008 and we'll have to work hard to maintain sales if there is a Brexit-induced recession. Austerity-led policies have led to a cash freeze or reduction in public funding throughout our sector, which means that earned income must grow at a rate that is higher than inflation, if arts organisations are going to be able to stand still. The pressure on the value of the pound which has resulted from Brexit has inflationary potential. As with all arts organisations greater inflationary pressure puts even greater pressure on us to earn more income. These pressures, if manifest on the bottom line adversely affect our resilience and sustainability. We're also embarking on a large capital project and we're aware that costs may escalate.*

*We are located in one of Europe's great capital cities and our core customers are 400 million Europeans. The slide in sterling has already raised our costs. Within the UK, we anticipate that UK consumers will begin to rein in their spending as an inflation related income squeeze sets in. There is already weakness in the London housing market arising from Brexit fears. (Pantheon Macroeconomics 'THE UNITED KINGDOM IN H2 2016'). A 'closed' London could lose its status as a premier global capital - very costly indeed to the national economy which will directly affect the arts, and affecting London's status as the 'Design Capital of the World' (Julie Lasky, New York Times 2012.) Brexit is already disproportionately affecting the London economy. Samuel Tombs, of Global Macroeconomics has observed "Surveys since the referendum...indicate that the capital is at the sharp end of the post-referendum downturn". London businesses were harder hit than those in any other region following the nation's departure from the EU, according to a new report from Lloyds Bank Regional Purchasing Managers' Index (PMI), and employment in London also fell, putting an end to a month-on-month expansion. As a London based organisation post Brexit risks include:-*

*Increased processing costs / bureaucracy - if no access to single market*

*Income squeeze on London and UK residents*

*Higher materials costs*

*Problems in recruiting and maintaining skilled staff*

*Cultural isolation, isolation from local opportunities ( ie 400 million strong community), funding and regulation systems, student and professional exchanges*

*Increase in high risk business - non European customers / new relationships*

*Additional trading costs - differently regulated environments / legal systems*

*Increased investment risk - in long distance transport of goods and people- high risk / prohibitive costs, legal issues.*

*We are most concerned that interest rates will drop on our endowment funds. Patrons and donors may become less forthcoming with donations because of their personal investment concerns as well. We also aim to work with and engage artists across Europe and it would become more difficult in a post-Brexit UK. We were also planning on applying for a large sum of European funding to fulfil our ambitions in the next year and we don't believe this funding will remain once we are no longer part of the EU.*

*We become isolated from European voices and ideas. We become too inward looking or miss opportunities because we are not around the table with friends and partners. The cuts in funding along the food chain from artists to institutions will mean less opportunities and more demand on other sources. To be part of a country (and its policies) that doesn't deal with the unfounded anxieties over movement of people.*

*We have a lot of civic organisations as clients funding our community arts offers who may suffer further cuts*

*We support over 1,000 individuals working in the arts sector in the North of England. Most of these are self-employed and a significant number do not hold a British passport. We are currently working hard to allay fears that many artists and those working in the sector will be asked to leave the UK. Whilst larger companies and organisations/employers will likely negotiate some kind of mechanism whereby they can obtain work permits etc to continue to engage non UK individuals, those who are freelance or self-employed will be left with little representation and we see this as a big risk - that we might lose our creative community. The uncertainty has added yet another layer to the insecurities and stress of life as a freelancer in the creative sector in the regions. Most especially within the North of England where some areas were (and have been ever since) especially vocal and angry about perceived excessive levels of migration and immigration. Many of our members who work in participatory arts and community arts have reported an increase in hostility in certain areas and some have been verbally and even physically attacked.*

*Our support has gone from helping creative people achieve their dreams to helping them survive financially and now to a whole baser level of helping them get through the day. The tremendous amount of grass roots and proper community based arts & creativity across the northern areas of England is at risk. We need the entrepreneurial creative mix of different cultures and perspectives to sustain everything - from quality of life to economic contribution and if we continue to ignore the grass roots and regional arts I believe we risk the entire creative & cultural sector which is so respected by other countries and has been so successful & valuable.*

*We work extensively with European partners and have been the lead partner in two European Union funded projects, and a partner in one further European Union funded project, we are in the process of jointly applying to a further European Union Grant. We have also been funded by the European Cultural Foundation. Thus European funding has been a major source of our income. Beyond the financial implications, the Brexit sends a negative message to partners and potential future partners about the UK about the UK's attitude towards international participation and exchange.*

## Key Considerations for UK Government

### **Q. What key issues do you believe the UK Government must seek to address in its negotiations with the EU to ensure that the UK arts and cultural communities continue to thrive?**

*A clear cultural connection, and exchange of skills, shows and funding between EU and UK. A clear strategy for strengthening links with other markets, namely US, Middle East and Asia. To ensure the rhetoric is positive, inclusive - and pro-partnership, not isolation. Shore up every single penny of funding lost from EU cultural pots, since they've put us in this ridiculous mess. Not allow themselves to start over-subsidising areas of the UK which have lost EU funding, but equally voted Brexit - to the detriment of London and other big urban centres which votes to remain.*

*Movement of artists/collaborations. Protection of current EU artists residing in U.*

*Reducing red tape to allow small and medium size organisations to tour outside of the UK. Many have limited infrastructure and so will be put off by international touring post Brexit due to cost and complications. Funding streams available for international touring and mentoring to help solve these problems.*

*1. Straightforward mechanisms for arts professionals to move for work between the UK and Europe. 2. Funding for transnational projects. 3. No additional tax burden (VAT)*

*A single market with free movement of EU citizens is important and the freedom to trade and partner with any other country in the world it so chooses without facing any EU block.*

*Access to collaborations between UK and EU countries. Continuous support for arts development in form of grants and other funding.*

*An agreement which responds to the issues raised by Brexit, so we can get on with things and be good Europeans outside the EU. Although I did not support Brexit we cannot agree anything like freedom of movement or paying into the EU budget as these are the reasons for Brexit. I think having an agreement which ignores the voters would be disastrous. At the same time we should go out of our way to promote the culture of our EU neighbours.*

*Continuation of EU partnership funding opportunities*

*Continued support for human rights, migration, health, and arts/culture funding.*

*Continued support from EU funding sources, free movement of people, favourable trade deals to allow the economy to grow again to deal with weaker currency and economy which impacts on us as a business.*

*Don't make it harder for visiting practitioners and academics to get visas.*

*Ease of European artists working in the UK. Ease of UK companies working and presenting in Europe with European partners*

*Ease of touring, ease of exchange and visiting, for artists - as much continued access to European fora as possible.*

*Easy access to work in the UK and for UK citizens to work abroad for the duration of creative projects and independent work. Streamlined systems to allow easy selling abroad, and purchasing of products from abroad.*

*Easy visa access for visiting artists, recruitment of players from throughout Europe (and the world) for permanent positions.*

*Enabling existing EU citizens, resident and working in the UK currently, to remain working in UK post-Brexit.*

*Ensure Britain remains part of the Creative Europe programme.*

*Ensure continued ease of exchange and mobility of artists. Continued co-operation and partnerships*

*Ensure equal level of funding to cultural causes.*

*Ensure freedom of movement. Ensure that UK organisations and individuals can still be part of pan-European projects and collaborations funded by the EU. Ensure that people of other nations both living in and visiting the UK feel welcome and valued. Ensure that the UK population as a whole understands the value of and benefits from living in a multi-cultural and internationally connected country.*

*Ensuring continued membership to as many EU bodies as possible. Ensuring our colleagues from across Europe have indefinite right to remain in UK.*

*Ensuring maximum freedom to trade and move people around - whether bringing in specialist staff or exporting cultural product to the EU. IP rights and agreements, shared standards on accountancy and audit, common protocols on a whole range of technical issues....*

*Ensuring that the creative sector / ARTS are firmly placed on the Governments agenda and understand the income that the arts brings into the treasury coffers.. Applying for EU funding in future as we are in Europe if not in the EU anymore. Long term objectives / strategy from the government so that everyone can plan accordingly and not lurching from unknown to unknown crisis'*

*Ensuring that UK arts and cultural organisations have a clear path to participation and funding with EU projects, particularly those initiated by EU partners.*

*Enter into a EFF status*

*EU funding and mobility of artists !!*

*Fight for our right to compete fairly for European funding*

*Free and straightforward passage for EU nationals to work in the UK.*

*Free exchange of artists - touring both directions. No work permits, visas, carnets etc etc. Access to European funds and partnerships.*

*Free movement in terms of not making travelling difficult to encourage exchange of ideas etc*

*Free movement of artists and organisations between countries.*

*Free movement of artists without barriers relating to how people are paid, or by whom. Free movement of theatre equipment without customs and carnet documentation and financial overheads. Access to partnerships and joint EU and UK funding for collaborative projects and partnerships*

*Free movement of artists, technicians, producers, ideas, capital flows and audiences must be maintained. Or our industry will decline. There is no doubt about that. For 40 years the live arts has thrived on exchange, global connectivity and the diffusion of European expertise and innovation across the continent. This has made up for the prohibitive difficulty of working with, say, African artists. Now we are faced with the annexing of our industry - and nowhere to turn except inward. There must be: Visa-free travel for those wishing to work or study in the creative industries in the UK. Visa free travel for artists from countries beyond the EU wishing to perform here.*

*Free movement of artists.*

*Free movement of European citizens. Continued funding from the EU for the arts (as we can't rely on UK funding)*

*Free movement of labour (in and out); protected funds for EU creative research and collaborations; investment in creative and civil infrastructure projects.*

*Free movement of people. Collaborative, open spirit so we don't become a marginalised, isolated Island.*

*Free movement of talent. Remaining within the AI system. Maintaining the ability to tour across Europe*

*Free movement of UK Artists should be free to work and to collaborate across borders in Europe (the world actually) and continental European artists the same. Travel should be easy and visas if imposed should be free.*

*Freedom of all cultural activities across the continent, with no artificial barriers for artists or writers or people involved in the creative industries. This could so easily allow history to repeat itself - a history that alas is very quickly being forgotten.*

*Freedom of artists to work in the EU / travel to the UK*

*Freedom of circulation of goods, no customs tax for art! No need for Visas for working in EU countries.*

*Freedom of movement across Europe and pay rates and affordable work and living space for artists within cities alongside the benefits this brings.*

*Freedom of movement for artists and minimal visa restrictions to perform and collaborate with UK arts organisations. Funding to replace EU partnership support to ensure continued exchange of work and practice. Replacement funding for academic / artistic research collaborations. Support for artists to travel and work abroad.*

*Freedom of movement for artists at all stages of careers*

*Freedom of movement for European students to study here and for artists to be able to exhibit/perform here at no or low cost is vital. Some sort of concession for temporarily importing artworks that are being distributed via exhibition/performance. Seek to ensure the UK can still have access to European funds or are able to benefit as named partners.*

*Freedom of movement of high quality artists and arts companies, whether through "points based" system or previous freedom of movement type rules. Retaining low cost travel possibilities also important. We have not been in receipt of European funding support but I am sure for some arts organisations access to this type of support will be important.*

*Freedom of movement of people. Open generous spirit during negotiations so we don't become an isolated island and alienate our neighbours further. Trade agreements which don't make touring in Europe more complex and difficult to manage*

*Freedom of movement within the Eurozone. Continuation of funding from European sources. Promotion of British Arts as 'soft power' around the world. Encouragement of co-production with European countries.*

*Freedom of movement, strategic support for education and access to the arts and culture as well as a financial investment in training, further education, access and equality.*

*Hmmm. The things we think are important may be way off the agenda already because they are about how artists feel, and are perceived, as much as the economic situation. But, maintaining channels through which artists can collaborate - and be funded to collaborate - across Europe is very important to us.*

*I do not think the arts really are an issue at all in this and so the answer is nil*

*I'm afraid I don't have the answers for this. The things that make us thrive as an organisation are free movement of trade and workers, being signed up to the European Convention of Human Rights and being accountable to the European Court of Human Rights, all things that seem increasingly unlikely in post-Brexit Britain. We need immigrants to keep the arts scene alive - they make it culturally diverse, socially relevant and artistically interesting. Basically, if the government pretended the whole thing didn't happen I think we could look the other way.*

*Ideally free movement maintained for visits of 6 months or less to encourage continued collaboration and partnership. Making the visa process for EU artists visiting the UK as simple as possible and negotiate terms for UK artists visiting the EU to have similar terms. Make funding available to cultural organisations and the higher education sector for collaborative projects and research.*

*Ideally we could/should come to funding agreements around buying in to cross border collaboration co-funded with European funds.*

*It is for us essential that culture remains a part of the negotiations with the rest of Europe. I am very worried about the impact on cultural exchange and development and fearful of the empty Leave campaign's promises to replace the funding as we lose it. We will negotiate our new relationship with the EU but need reassurance that this goes beyond trade and security to consider culture, community and civil society.*

*Key requests are:*

*That we maintain free movement of EU artists/cultural workers*

*That the UK continues to buy into the Creative Europe programme*

*That the UK continues to buy into the Erasmus programme*

*That the UK continues to support other funding streams that support civil society programmes in the UK.*

*That additional support is given to either the British Council or the Arts Council to rebuild this damage and ensure that UK arts organisations are represented on platforms, advisory bodies, networks.*

*Already our place in Europe feels downgraded; our cultural ties loosened, our futures divergent. I hope we can preserve as much of the spirit of collaboration and cultural cross-fertilization that has been the driving force of our continent and our union for so long - but we now need our government's help to do it.*

*It is important to understand that the creative communities in Europe and the UK want to work together. The relationships are strong and there is mutual respect on both sides, that even now are continuing to be nurtured. In general, it is widely accepted that the creative communities across the UK did not want to leave Europe and are reeling from what this could mean to the immensely productive and creative networks that have been built up over the years. It could be potentially devastating if restrictions prevented creatives being able to move freely and work together. If the potential funding losses from not being able to access European funding are as restrictive as artists are worried they might be and added to the already dire financial situation that the majority of artists and particularly smaller arts organisations find themselves operating within, it's difficult to know where any growth for the future of the arts will begin. We were an RFO and were not accepted as an NPO, but have survived because of sheer hard work and sacrifice and a knowledge that it is the small organisations who provide the first opportunities for career development for huge numbers of early career artists. So many companies have folded. If we are to continue to lead the world in terms of our cultural offer, maybe there should be a closer look at where the artists who are the cultural leaders of the future get their first breaks!*

*It would be fantastic if we could still tour or take part in international projects as easily as we have done in the past, without needing visa's etc.*

*Maintain ease of access into UK by EU artists and organisations*

*Maintain links with key programmes Creative Europe, EISF, ERDF to ensure UK companies can continue to be equal partners in European programmes. Maintain commitment to freedom of movement by EU citizens.*

*Maintaining many of our current benefits which seems unlikely! Maintaining good relations based on an agreement that recognises the contribution of the arts and cultural sector -only likely if there is a good economic case, articulate politicians and great advocacy*

*Maximising the free movement of art and artists between countries through agreements that keep cost and bureaucracy to a minimum.*

*Mobility is huge - we need to negotiate that there is still freedom of movement (relatively) for those involved in the creative and cultural sectors. This must not only require proof of excellence or notoriety, nor be restricted to performers/artists - otherwise we will lose many of our largely invisible army of freelance artists and community workers who tirelessly provide the life blood and foundations upon which the artistic excellence our sector is recognised for, depends. We need to find a way to retain our current freelancers who are highly resilient and bring huge benefit to our sector and our country through their practise. Many of our creative ideas and enterprising ventures come from this element of the creative and cultural eco-system. Whilst 75% of our membership earn less than 15k per annum, few seek any government support in the form of benefits, preferring to find enterprising ways of living frugally - many due to high ethical standards. We should not lose these people who set examples and activate within the communities they serve. Not only mobility flowing inwards but also outwards - with the British Council and other government agencies supporting an increased effort to enable our arts & cultural communities to travel abroad, share learning and experience and interact. We should look to NZ for models of this - they recognise they are an island in danger of becoming insular and therefore run extensive and well-funded programmes that engage with other countries and create opportunity for exchange, promotion and inspiration.*

*Movement of art professionals without Visa restrictions.*

*Opportunities to access funding does not decrease*

*Our artistic freedoms here and the art we create inspire artists worldwide to create better art and opportunities in the own countries. We shouldn't stifle that.*

*Our megacity generates as much tax as the next 37 largest UK cities combined (10 years of tax- How Cities contributed to the National Exchequer from 2004/05 to 2014/15, pub Centre for Cities July 2016) To damage London's economy - and a hard Brexit damages London very badly - is to damage the UK's economy, with its dependence on London.*

*Our priorities are*

- 1. Retain unfettered access to Single Market (especially for London)*
  - 2. Retain freedom of movement for UK / EU nationals (especially for Londoners, who are often young, brimming with creative energy, cosmopolitan, well-educated and Britain's future)*
  - 3. Maintain current arrangements for transferability through different national healthcare / insurance systems - UK citizens travelling and living within EU, EU citizens within UK; students, working people and retired*
- Maintain current EU / UK student and advanced research programme exchanges - arts, social sciences, science and technology.*

*Retention of EU funding. Retention of freedom of movement of people and circulation of goods.*

*Safeguard continuing visa-free freedom of movement. Guarantee the continued working freedom of EU workers in the UK*

*Significant loss of funding - we receive approx. £150-200k a year from Creative Europe. A loss of access to our European partners. Increased regulation over the movement of artists. The negatives massively outweigh the positives.*

*Structures and funding to enable HE R&D, Education and Youth with EU partners universities. Minimising implications of working with EU partners/customers : visas, travel, exchange rates, etc*

*Students are still able to stay in Europe and move as freely from college to college as they did. Same and more awards for the European community of Artists. Same or more communication between the UK and the rest of Europe about ideas and the arts*

*Support arts and culture to continue to keep UK a leading force in arts and culture globally. Ensure the world knows we are Open and wish to remain fully engaged with European mainland. Been seen to attend arts and cultural events as well as supporting it financially*

*Support of European partnerships, access of artists to work UK / EU.*

*That the UK can continue to participate on applications for funding when a partner with other EU nations. Exceptions to work permit / visa rules for touring work and visiting festivals and conferences. Finding other funding streams to support artist exchange.*

*That there is free movement of opportunities in terms of markets and funds open to UK artists.*

*The damage is already done. It seems unlikely that UK government will argue in favour of retaining freedom of movement/employment.*

*The Government needs to see that the arts is a major export for the UK, with enormous financial and cultural rewards. They need to safe guard the funding for the arts to make sure Britain maintains its cultural diversity and high quality. We cannot allow the arts to suffer as a result of this ridiculous decision.*

*The protection of EU funding for as long as possible, and the free movement of people.*

*This is more about the government understanding what we will lose than trying to negotiate for what can only be tokenistic gestures. The government now needs to think hard about what it will have to put in place (with all that supposed extra resources) to ensure that our arts and culture including capital developments, artistic projects, working with communities, research and others gets the funding it needs to be able to carry on the successful work it does.*

*To ensure that the flow of artists from the UK to Europe and from Europe to the UK continues unimpeded by lack of clarity, bureaucracy and red tape. If that is not the case, then ensembles' financial viability may no longer be workable.*

*To keep communications open and to assist with facilitating collaborations in terms of red tape etc*

*To protect cultural co-operation through Europe, to enable the movement of art and artworks. To protect mutual support for artistic product and presentation.*

*Try everything to reverse the decision to Brexit! Free movement of European nationals. Continued access to EU funds for cultural projects*

*UK Government will need to invest more in the Arts Council to make it possible for NPOs and other organisations through Grants for the Arts to access funding to meet the costs of European artists' visas.*

*Very difficult to respond to this because in spite of the Arts being a superb 'UK Brand representative' and one of the biggest earners the present Government (and the last 3) does not respect or help the Arts much and I cannot imagine that they will represent the area very well.*

*Visa-free travel; reciprocal permit-free work agreements between us and the EU; mutual VAT and tax policies and regimes to allow simple local treatment of VAT without needing to claim back in every territory we do a single sale, avoidance of withholding tax liability in each country we work, etc.*

*We don't have a view on the negotiations with the EU - we have not received EU funding in our area, and cooperation with bodies such as ICAF (International Community Arts Festival) do not rely on our membership. We do feel that government policy is too focused on large-scale, city-based initiatives with areas of lower population density missing out. This trend is echoed in other funding streams, and we have less potential for raising significant funds locally.*

*We need the pound to stabilise and we therefore need to see less ambiguity in our relationships with Europe. Some indication of how we propose to live with our closest neighbours would therefore be extremely useful. In order for us to engage in the cultural activity with our closest neighbours in Europe it would be good to see a situation where we are able to export our work easily and readily into Europe, whilst at the same time being able to encourage visiting cultural production here from abroad. A good way of doing so would be to negotiate the free movement of goods, services and people across the wider continent. So I'd like to see the UK government negotiate a deal which is as close as it can possibly be to being a member of the European Union!*

*What does 'continue to thrive' mean? How many organisations are actually involved in the EU. We are not, but have partners in the Caribbean. The focus on the arts missing the whole point, all of us will be effected, go back to my Jurassic park - you seem to be referring to the Big Dinosaurs, the little ones will just get trampled on. To try and raise the issue of the arts, when employment, jobs, businesses are in trouble, action has to be united - Arts should join the big boys and I do not mean just the main theatres and the cultural megasaureses.*

## Immediate Impacts on Private Sector Fundraising

**Q Dec 2015. Thinking about your likely fundraising year-end position for your current financial year, how do you feel your organisation will have performed (in terms of monies, received, pledged and projected) when compared to your organisation's position at the end of its last completed financial year?**

(Responses: 339)

**Q. Aug 2016. Thinking about the potential impacts of Brexit on your private sector fundraising for your current financial year, how do you feel your organization is likely to perform (in terms of monies received/ pledged) against the projections set at the start of this financial year?**

(Responses: 370)

(NB: Following categories of responses not shown in table below to aid clarity of presentation:

'This is the first year in which we've fundraised in this area', 'We do not undertake fundraising in this area', 'Don't know')

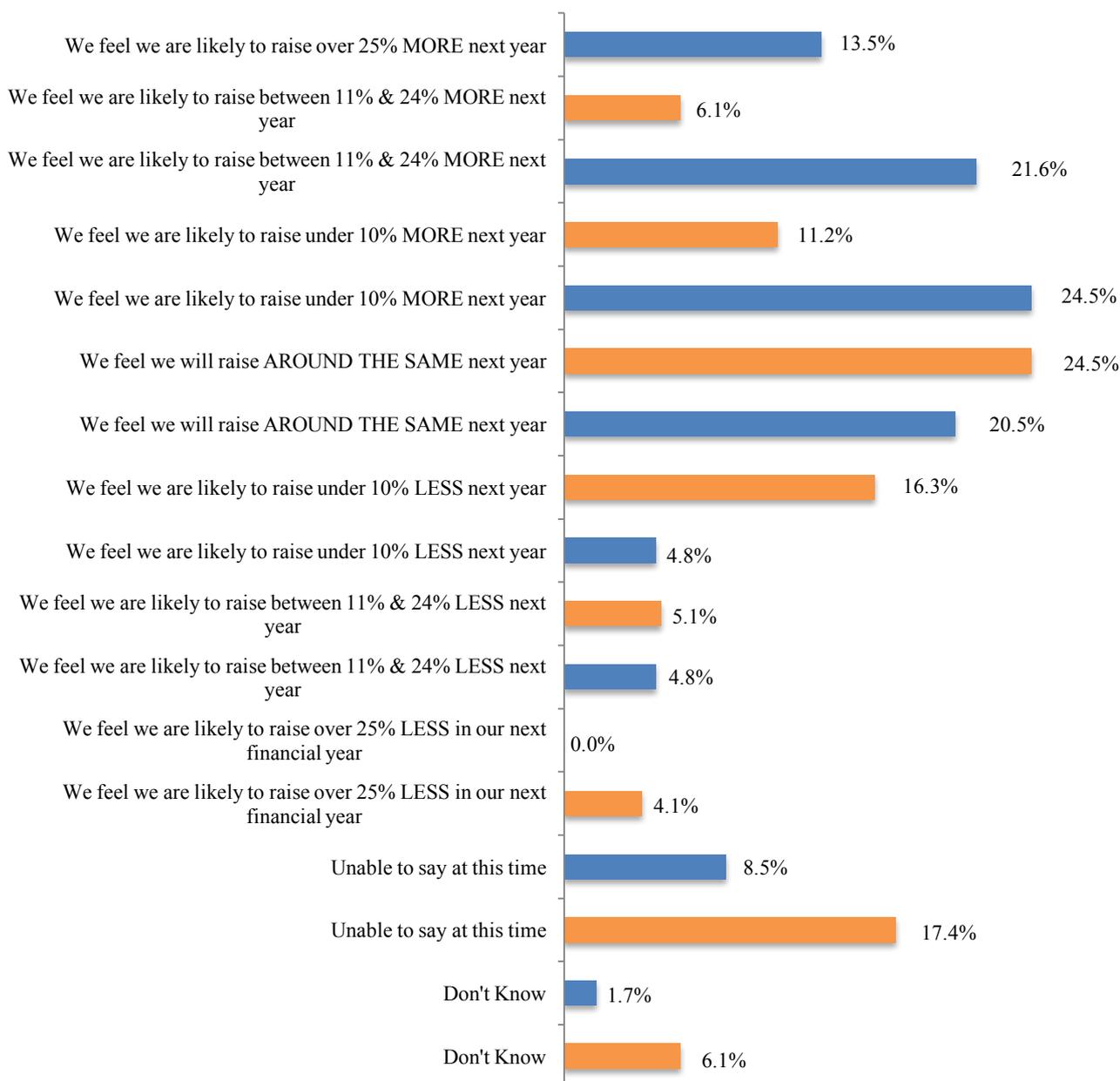
	We are likely to have raised significantly more (ie more than 25%)	We are likely to have raised more (ie greater than 11% but less than 25% more)	We are likely to have raised marginally more (ie up to 10% more)	We are likely to have raised around the same as last year	We are likely to have raised marginally less (ie under 10% less)	We are likely to have raised less (ie over 11% but less than 25% less)	We are likely to have raised significantly less (ie greater than 25% less)	% of respondents engaging in this area of revenue generation
Sponsorship from companies	4.1% 2.0%	8.3% 0.0%	11.7% 2.0%	20.7% 29.9%	5.5% 7.22%	4.8% 5.1%	5.5% 11.3%	60.6% 71.2%
Philanthropic gifts or grants from companies	4.8% 0.0%	8.9% 0.0%	9.6% 4.1%	23.4% 22.4%	5.5% 10.2%	2.1% 4.1%	4.1% 9.2%	58.4% 68.4%
Corporate membership or patron programmes	5.4% 0.0%	3.4% 0.0%	10.9% 2.0%	21.1% 16.5%	4.1% 12.4%	2.0% 4.1%	1.4% 4.1%	48.3% 54.7%
Project-based grants from Trusts	12.5% 4.1%	20.1% 1.0%	14.6% 7.2%	22.2% 42.3%	9.7% 14.4%	7.6% 7.2%	4.2% 8.2%	90.9% 92.5%
Core Funding grants from Trusts	7.6% 1.0%	7.6% 0.0%	10.3% 6.2%	27.6% 31.9%	6.2% 5.1%	4.1% 8.3%	4.8% 7.2%	68.2% 72.3%
Gifts from Individuals of more than £1000 each	9.0% 1.0%	6.9% 0.0%	13.2% 4.0%	20.8% 23.2%	2.8% 14.1%	4.1% 3.0%	4.1% 10.1%	60.9% 62.3%
Gifts from individuals of less than £1000 each	4.8% 2.0%	11.1% 0.0%	22.2% 3.06%	24.3% 30.1%	3.4% 16.3%	4.1% 3.0%	2.1% 9.2%	72.0% 70.5%
Individual membership programmes	3.4% 1.0%	3.4% 0.0%	9.7% 3.0%	29.2% 21.4%	2.8% 8.1%	4.8% 4.1%	0.0% 2.0%	53.3% 55.6%
Crowd funding appeals	2.8% 2.0%	0.0% 0.0%	4.2% 1.0%	12.5% 16.5%	3.5% 7.2%	0.7% 1.0%	1.4% 4.1%	25.1% 28.5%
Fundraising Events	8.3% 1.0%	7.6% 0.0%	7.6% 3.1%	20.1% 16.5%	4.2% 15.5%	4.2% 4.1%	1.4% 4.1%	53.4% 56.5%

**Q Dec 2015. Based on your fundraising performance in this your current financial year and any other relevant information available to you at this time, how do you feel that your organisation is likely to perform overall in this area in your next financial year?**

(Responses: 339)

**Q Aug 2016. Looking ahead to your next financial year and again, taking into consideration possible Brexit impacts, how do you feel that your organisation's overall fundraising performance is likely to shift?**

(Responses: 370)



**Q. If you have reported a shift in fundraising revenues in your responses to the last two questions (either positive or negative) compared to your position before 23<sup>rd</sup> June, can you tell us what specific issues you attribute this change in viewpoint?**

*Lack of fundraising opportunities due to the predicted financial downturn.*

*1. People will have less money to share. 2. However, we will be launching an essential fundraising campaign.*

*At the moment it is unknown whether commissioners/funders will stop funding projects, as they did when the recession started, which when twinned with uncertainty over European funding, makes for a very unclear future and one where trying to plan ahead is fraught with challenges. Capacity means small organisations do not have sufficient staff to tackle too many dead end applications for money. If there is a succession of unsuccessful applications a small company will not survive.*

*Companies are definitely already anticipating the financial pinch due to the dramatic economic impact of the referendum result alone. This means that fundraising from sponsorship and corporate philanthropy etc is already lower than usual. Individuals are less likely to immediately feel the effects in their purse it seems although there is an anxiety and there is already an increase in competition for Trusts and Foundation fundraising in anticipation of future challenges.*

*Companies holding back on commitments until implications become clearer. Individuals loss of confidence in the economy*

*Everything is so uncertain. it appears from early indications that the uncertainty following Brexit adds to the changes accompanying growing privatisation in education (a source of income for us) creating a very cautious climate with no funding for 'extras'. Therefore, we have to go back to fundraising sources that everyone else is also applying to. The competition means excellent projects are not funded. We may well be amongst those rejected.*

*feel that there will be less money in government and businesses are likely to suffer, especially here in the North*

*Foundations are already telling us that Brexit will increase their focus out of London and increase demand for their monies.*

*I feel certain that people are less likely to sponsor things at the moment when the future is so uncertain.*

*I think corporations and companies will be less likely to invest in the arts as they are wary of their financial futures. Trusts and foundations will become oversubscribed because of this and cuts to European funding but I think individuals will remain the same, if not become more generous to help in our plight. However, it does depend on their personal financial status and how they will gain/lose out post-Brexit.*

*I think the overall political environment in the UK has led to a period of inaction, people and organisations are not acting or making strategic decisions because this feels like the country is on the cusp of major change and no-one knows what this really means for them.*

*Internal changes also supported by shrinking growth from the companies who have donated in the past.*

*Investment in our fundraising infrastructure from an external body will increase the range and breadth of fundraising at the organisation.*

*It is too soon to say what impact it might have on our fundraising from trusts or businesses, but we definitely feel that our individual membership schemes will suffer as people are uncertain about the future.*

*It is unclear at present. The uncertainty on all our possible financial sources of support, audiences, local authorities, arts council, business sponsors, charitable foundations, individual donors, is just you soon to judge*

*It's a guess, but some of our corporate supporters are bound to be less generous and more cautious, in the current climate.*

*Many Trusts and foundations are concentrating on areas of obvious need such as homelessness. Proving the case for those whose aims are the arts is always difficult and the major players have better resources to achieve success than we do at present. We can no longer access some European trusts and foundations Universities with whom we work have lost 10%-15% already*

*No change expected this year but we expect the financial climate to worsen next year onwards which will have a negative impact on fundraising from companies and individuals. The cut in interest rates will hit grant-giving trusts.*

*Nothing to do with Brexit: we have a new business plan. However, Brexit will mean that certain funding streams are not available to us, limiting this growth beyond what might be possible.*

*Organisations seem less willing to invest in staff development and training, a valuable source of income to support our creative programme. I suspect more organisations that have been supported by EU funds will be applying to trusts and foundations, and after many years of low interest rates those trusts are needing to rely on less.*

*Our programme is becoming more ambitious and we need to increase our funding to match increased expenditure.*

*Prior to 23 June we were optimistic about large-scale Creative Europe collaboration - in the sense we had clear aims, objectives and strong links. Now, the partnership is strong but the situation is so much more uncertain, it is impossible to retain the same sense of "can do" about the situation .. much as we'd like to!*

*Risk averse culture- very much high level of uncertainty everywhere which leads to apathy. Thus no time/ money/ thought for interesting ideas such as the arts.*

*Significant capital fundraising campaign skews our projections - we do not feel that Brexit will have a marked impact in the next 12 - 24 months other than the standard impact of national recession and potentially negative interest rates on private and charitable giving.*

*That some of the corporate funders/sponsors will move their HQs out of London. They will pay workers less and below the minimum wage.*

*The climate at the moment is anti-investment. That goes through the heart of private fundraising.*

*The economic downturn and change of Government ministers that may adversely affect funding opportunities. The increased demand on Trusts and Foundations given lack of opportunities to apply for Creative Europe, and other European networked funding schemes*

*The lack of clarity of what will happen next has already shown to have an impact on investor confidence. This will have a knock on effect on money that is available, and more organisations trying to access the smaller range of available funds. It also seems likely that the government will further cut not only the DCMS budgets, but vital departmental budgets that sustain a society.*

*The weakness of the pound. The hesitation from individuals, grants and companies to support organisations in the UK if the economic situation is unstable. The effect that customs charges if brought in will have on sales fundraising (DRASTIC)*

*There will be even more competition for funds if EU funding is no longer accessible, in the short term I expect a drop in our funding due to both competition rising and some funds that are links to the EU restricting their giving.*

*Uncertainty about income from all sources is inhibiting any decision to engage any specialist to support fundraising initiatives.*

*We are still planning to pursue our diversification of funding streams as prior to Brexit - they may not be as ambitious but they will still constitute an overall increase to our fundraising income.*

*We have been trying to increase funding through running more courses and taking on contracts*

*We rely on a large number of very small amounts given by individuals and organisations who are not well off. Mostly those who are themselves self-employed and therefore recognise the value of what we do. With the increased uncertainty and increasing cost of living, the people who keep us going financially will be even less able to pay for our services and yet more will be in need and also need more support.*

*We run a biennial festival, so funding targets fluctuate. However, we've already been told by a number of key supporters that their support will be down by over 1/3.*

*We run a significant event every two years which impacts on overall fundraised income. 2016/17 is a non-event year. This however allows us to focus on developing other things which for this year will be corporate relationships and larger individual donors to spread our fundraising risk.*

## Immediate Impacts on Earned Revenues

**Q Dec 2015. Thinking about these sources of earned revenue by the end of this current financial year end, how do you feel that your organisation will have performed compared to your organisation's position at the end of its last completed financial year?**

(Responses: 354)

**Q Aug 2016. Thinking about the potential impacts of Brexit on your earned revenues to this current financial year end, how do you feel your organization is likely to perform against the projections set at the start of this financial year?**

(Responses: 366)

(NB: Following categories of responses not shown in table below to aid clarity of presentation: 'This is the first year in which we've generated revenue in this area', 'We do not derive revenue in this area', 'Don't know')

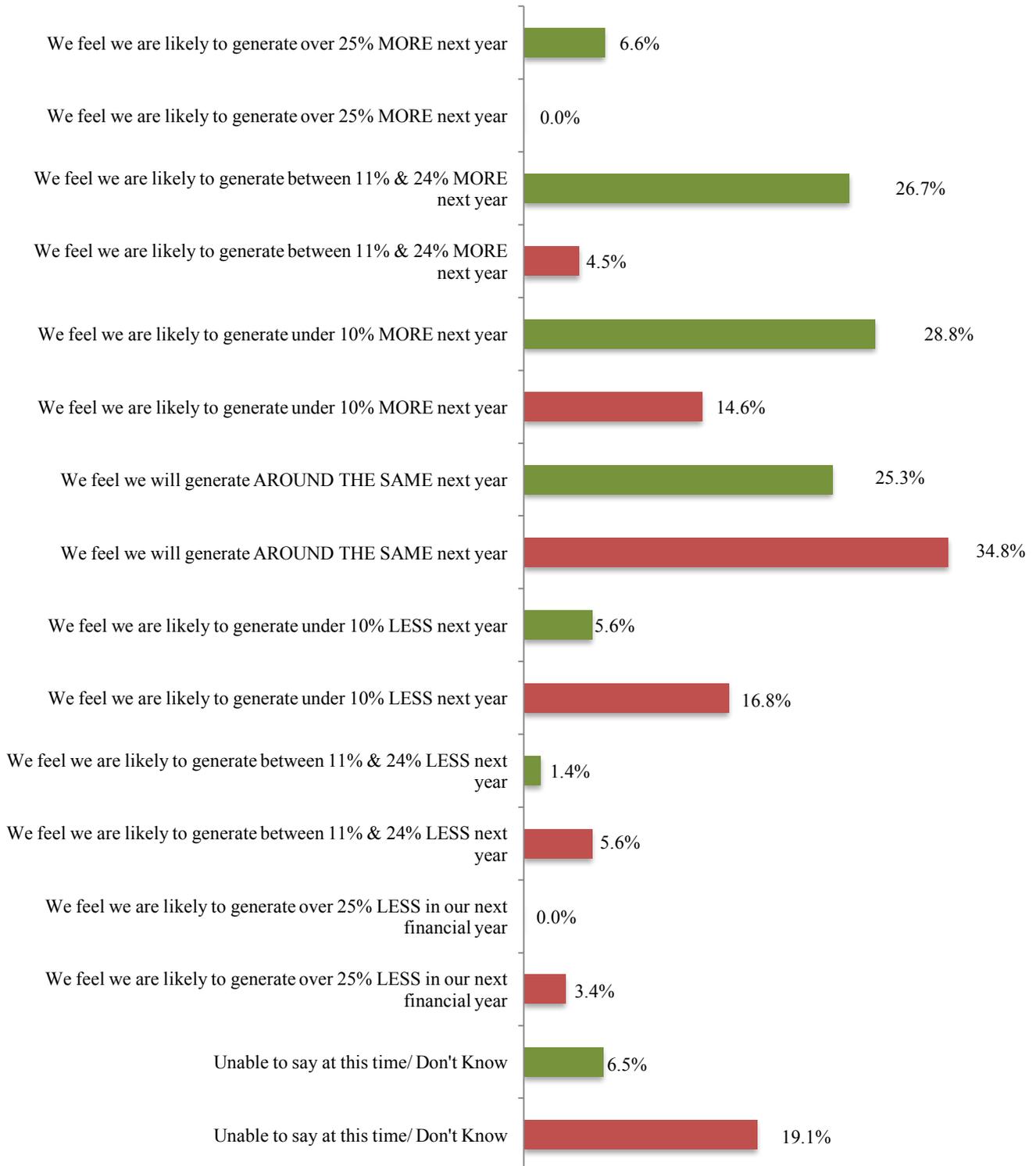
	We are likely to have generated significantly more (ie more than 25%)	We are likely to have generated more (ie greater than 11% but less than 25% more)	We are likely to have generated marginally more (ie up to 10% more)	We are likely to have generated around the same as last year	We are likely to have generated marginally less (ie under 10% less)	We are likely to have generated less (ie over 11% but less than 25% less)	We are likely to have generated significantly less (ie greater than 25% less)	% of respondents engaging in this area of revenue generation
Ticket sales/admission charges	3.6% 1.1%	12.9% 3.4%	19.4% 4.5%	3.6% 39.3%	3.6% 11.2%	3.6% 4.5%	7.2% 3.4%	53.9% 59.9%
Activity, course or class fees	2.8% 0.0%	7.8% 1.1%	20.0% 4.5%	28.5% 39.3%	5.7% 7.8%	2.1% 4.5%	0.0% 3.4%	66.4% 69.0%
Education, professional learning programme fees	5.7% 0.0%	7.8% 0.0%	15.0% 5.6%	24.3% 39.3%	6.4% 7.8%	0.7% 5.6%	0.0% 2.2%	59.9% 62.5%
Cafe/restaurant/bar/ on-site catering	2.1% 0.0%	4.3% 0.0%	14.4% 6.7%	10.8% 12.2%	7.9% 6.7%	0.7% 1.1%	0.0% 0.0%	40.2% 43.2%
Commercial/private hires of spaces on site	1.4% 0.0%	8.6% 0.0%	19.4% 2.2%	17.9% 29.2%	3.6% 4.5%	2.8% 4.5%	2.1% 2.2%	55.8% 59.9%
Touring activities	5.0% 1.1%	5.0% 1.1%	10.8% 1.1%	17.3% 29.2%	3.6% 6.7%	1.4% 8.9%	0.0% 2.2%	47.7% 52.5%
Co-ventures or co-productions	5.0% 1.1%	2.1% 1.1%	18.5% 3.3%	19.3% 31.8%	1.4% 4.4%	1.4% 6.6%	0.7% 3.3%	48.4% 51.3%
Online sales of merchandise or services	3.6% 0.0%	2.1% 0.0%	9.3% 1.1%	18.7% 21.3%	2.1% 4.5%	1.4% 2.2%	0.7% 3.4%	37.9% 41.3%
On-site merchandise sales	2.1% 0.0%	2.8% 0.0%	10.1% 6.7%	22.3% 20.2%	5.0% 4.5%	1.4% 2.2%	0.7% 1.1%	44.4% 49.8%
Commercial consultancy fees	1.4% 0.0%	3.6% 0.0%	6.4% 3.3%	9.3% 14.4%	5.7% 3.3%	2.1% 4.4%	0.0% 1.1%	28.5% 34.2%
Production build or hire fees	0.7% 1.1%	2.1% 0.0%	2.1% 2.2%	9.3% 14.4%	2.8% 3.3%	0.0% 4.4%	0.0% 1.1%	17.0% 22.5%
Broadcast fees	1.4% 0.0%	0.0% 0.0%	0.7% 2.2%	7.9% 12.7%	1.4% 4.5%	0.0% 0.0%	0.0% 2.2%	11.4% 15.5%
Publishing/print sales	1.4% 0.0%	2.1% 0.0%	4.3% 1.1%	11.4% 17.9%	2.1% 2.2%	0.0% 2.2%	0.0% 3.4%	21.3% 24.5%

**Q Dec 2015. Based on your earned revenue performance in this, your current financial year and any other relevant information available to you at this time, how do you feel that these revenue activities are likely to perform overall in your next financial year?**

(Responses: 354)

**Q Aug 2016. Based on your earned revenue performance in this, your current financial year and any other relevant information available to you at this time, how do you feel that these revenue activities are likely to perform overall in your next financial year?**

(Responses: 366)



**Q. If you have reported a shift in your earned revenues in your responses to the last two questions (either positive or negative) compared to your position prior to 23<sup>rd</sup> June, can you tell us to what specific issues do you attribute this change of viewpoint?**

*We hope to continue to grow our box office income slightly as we develop our brand year on year. We are predicting that Brexit will not have too much impact on a slight box office increase.*

*40-50% of our earned income per year comes from independent professional artists paying for participating in our development programmes. Since the recession in 2008, we have noticed that freelance artists in our field are not necessarily poorer in absolute terms, but that they have to work more hours to make the money that they make. We also noticed that they are more price-sensitive and / or risk averse in their booking behaviour; we don't know whether this is because they have less disposable income to put towards their professional development, or whether other factors (such as time, or perceptions of cost relative to income) play a part.*

*Again, at this point in the year it simply feels that a general economic anxiety is depressing spending across the board. Also, the exchange rate will have affected the earned income of companies who tour internationally. We have not done that this financial year but we are aware that if we had done, we would have lost out considerably, based on experience in previous years.*

*Business is flat, there are fewer tours, secondary spend is down*

*General economic climate, including domestic tourism.*

*General insecurity in the marketplace.*

*I believe that when you have a confused population, many of our normal clients will do without that extra book of unknown poems and instead will revert to the well-trodden and familiar path of tradition and past memories.*

*I don't think it's going to make a huge difference until article 50 has been deployed.*

*In recent years our company has benefitted from several international arts training projects that were EU funded. We had an eye on extending/expanding one of these in coming years, but at present do not see how that can happen post-Brexit.*

*Income from hires has been going down steadily for the last few years*

*Increased earned income next year due to variation in levels of planned activity - don't see any material difference in this due to referendum decision. In neither year are we planning to tour to Europe.*

*Increased investment and quality of our live arts programme - which is a completely self-sustaining revenue stream.*

*It is all dependent on the overall effect on the local and national economy - unknown at the moment*

*It's too early to predict what the impact of Brexit will be on our earned income. It all depends whether there will be a recession and how the government will respond to that, whether they will respond with another austerity budget. I don't think we will notice a significant change in our earned income this financial year.*

*Less appetite for spend*

*more pressures on arts sector - people may have less disposable income*

*Nervousness on the part of European presenters, economic uncertainty.*

*Our business model needs to move away from delivering over 90% of our events free of charge to adding a small nominal fee for people attending activity*

*Raised transaction costs in terms of movement of workers in relation to our foreign-language seasons and events, leading to a fall-off in activity and demand as producers and resources move to other cities within the EU.*

*Reduction in membership numbers*

*The economic downturn of public money, ie Local Authorities. Plus the massive clamoring for grants and high levels of submissions. It's a dog eat dog world out there!*

*The predicted lessening of earned income relates to the continuing difficulty of gaining sufficient fees from venues and the worsening state of the UK economy and buying power from individuals & LA's with whom we might work - but also to do with working with hard to reach communities where income is severely limited*

*There seems to be an immediate increase in tourism because of the drop in value of the pound, so we are likely to have a bumper (named) Festival this year through our bookshop and cafe. There are a lot of continental European tourists in Edinburgh this year. However, this is likely to be a short term gain as when movement through Europe becomes more complicated.*

*Uncertainty adversely affects earned income strategies.*

*Unstable financial situation means venues/co-producers are not willing to commit funds at this stage. Universities facing big cuts as a result so won't buy as many publications from us*

*We feel this SHOULD stay the same. These agreements were in place prior to Brexit.*

*We have already had some conversations that shows touring venues are under significant financial pressure and only able to pay low fees. Though not purely a Brexit impact, the sustained lack of investment in the regions, and the continued cuts to local government will make this worse. In addition, the economic uncertainty seems to hint at less investment from big companies, with the effect of fundraising and support from this side also falling away.*

*We have been preparing to work with partners who have applied for HLF and similar large funds. We anticipate being commissioned to create work for their programmes.*

*We receive some funds from European sources for our festival, we are concerned this is likely to be less than expected*

*We rely on European co-production deals which may be adversely affected by Brexit*

*Winding down of projects as funding will cease and further developments currently unfunded.*

## Anything Further on the Issue of Brexit

**Q. Are there any further thought that you would like to share concerning possible impacts of Brexit on your organisation and/ or the arts and cultural sector as a whole?**

*2/3 of our activity is translating books from European languages and we depend on translation grants from cultural institutions abroad, mainly in EU countries, and we hope this is still forthcoming. We don't feel there will be anti-European feelings in our readers.*

*A depressing result but one that we now have to live with and make the most of - the arts can play a part in healing divisions within UK society, one would hope.*

*A general feeling of pessimism. Brexit is about looking inwards - navel gazing - when we should be looking outwards to our friends in Europe*

*A sector of the public have been encouraged to foster a narrow view on community and migration. This is often followed by a narrowing of opinion on the value of culture and arts*

*access - particularly disability access may suffer as budgets are squeezed*

*Arts and culture can play a big role in encouraging civic engagement, inclusion, training, supporting ambition, nurturing talent. However, it cannot do this on its own.*

*As a non-executive board director of a limited company our income derives primarily from membership and Arts Council NPO. Should artists gain less work as a result of the UK leaving the EU, this could be both a threat and an opportunity.*

*As a small, experimental touring company regularly collaborating with a range of international artists and partners, we are deeply troubled by the philosophical message Brexit gives the rest of the world. Although the full effects are not known yet, the sense that our cultural sector will be fragmented and compromised by this decision is of real concern, perhaps unfounded but still very real at the moment. One member of our team who lives in Brussels is already feeling the fall out by her earnings diminishing by £500 a month due to the falling pound, musicians we work with are struggling to plan pan European tours. We look forward to hearing more from others - thank you for undertaking this research.*

*As an organisation we are very scared for the future, it's taken 16 years to build our organisation to be where it is. Most of our work happens through touring and throughout the years we've worked alongside European partners in France, Spain, Holland, Norway, Portugal, Denmark, Germany & Italy. Our work benefits from this cross-cultural exchange and has become stronger for it. We are not an Island, we are part of a bigger network of countries, companies, artists and individuals. Brexit is madness !*

*At least half my worries are about the perceptions of the Brits abroad, and the negative impact this may have. All the rest, regarding income projections etc, is a total guess. If we have a recession, as some predict, no doubt we will suffer more.*

*At present I am very apprehensive and very negative towards Brexit - I believe it could potentially become a route to backdoor cuts to the arts (ie blame it on Brexit) when it is actually Government policy, as well as other cuts to the social, welfare, education and health service.*

*At this moment it is difficult to really predict - but the political and social world in which we are working has openly shifted with the majority of the UK population having different views than possibly the general view of the arts sector (anecdotally only). So the playing out of the financial consequences are one thing but the cultural shift - "taking back control" "immigration out of control" "Britain for the British" - and the potential re-aligning of our actual and conceptual borders, together with the obvious disconnect between vast areas of the country and those "in charge" should give the artistic community cause for concern. And by that I mean that if artists are there partly to hold up a mirror to society and to engage with them in a variety of ways then there is considerable work to be done. For a company with a focus on gender equality there is also a concerning trend towards a more conservative (small c) attitude to some of the hard won rights for women in particular. In reality it is likely that coming out of the EU is only one factor and that the broader situation across the Middle East, Syria, Iran, Iraq and Turkey plus the tide of conservatism in the USA, the rise of the right wing across the EU and the rate of change in terms of the digital world in which we now live will provide greater political, social and cultural changes to which the arts sector will need to respond to be relevant and necessary.*

*Besides the impact on the funding situation as the economy retracts, we feel very concerned by a general sense of the nation apparently becoming more inward-looking and less inclusive in outlook and attitude. Many, many arts organisations thrive because of creating work that challenges people to be outward-looking, global, collaborative, inclusive and diverse which flies in the face of the decision made at the referendum. We are also aware that politics is taking a sharp turn to the right and we anticipate that subsequent governments will be less likely to prioritise the arts and arts education.*

*Brexit is detrimental to the arts as the artistic community has always relied on collaborations with our European counterparts. Leaving the EU could potentially put more strain on artist led activity which were already very difficult to nurture and funding streams difficult to access. Both are now under threat.*

*Brexit is intrinsically negative for the UK arts scene, both in terms of perception, foreign exchange of skills and wealth - and core funding both domestically and internationally. The arts sector should be very worried, and we need a strong leader to promote the arts in the storm that is about to come.*

*Cultural sector thrives on international collaboration and UK culture is a valuable export that needs to be protected at all costs.*

*Concern about progress with academic research institutions and restrictions (freedom of movement and funding) due to Brexit. Recession always hits the cultural sector hardest. Brexit indicated the growing divisions in our society - the arts has a leading role to play in understanding and healing these divisions and this role should not be underestimated.*

*Diversity feeds creativity. The Arts sector thrives on collaboration with partners, both across Europe and internationally. We are very concerned about the impact Brexit may have on this spirit of collaboration.*

*From our understanding of the effect it may have, it is better to wait to see the effect first rather speculations.*

*\*\*\*ing depressing! Sorry- I mean, it's an opportunity for us to really think about diversity, connection and how the arts need to do more in society. Arts are NOT reaching that % of the population that want to shut down connections. We are failing as a sector.*

*I am worried that arts and culture will once again be pushed to the back of the queue in terms of government and public support, due to the pressure on our finances and resources from other more urgent issues. I think arts and culture can have a powerful role to bring communities together, build bridges and continue to promote international work and viewpoints from across the world.*

*I believe the cultural and creative organisations in England have to be extra careful to appoint the very best people with the best ideas and philosophies in roles where their actions will result in either at least a continuation of all the wonderful progress we've seen over the years. The alternative where some of the present "political elite" rule could well end in disaster with our culture being defined by the basest form of shows as seen on the popular networks, or wholly governed by what is considered at present as the "important" features on the social media -platforms.*

*I don't think the true impacts will be apparent until we understand the terms of our leaving and, in fact, probably not until several years after we have left. However, at the moment it seems to me that the little Englander mentality, looking inwards rather than outwards will fundamentally threaten the creativity currently shown in UK and, that in turn will stunt our artistic growth for the long term.*

*I forgot to mention the currency fluctuations - we work on international projects, and the changes in rates were a bit of a ride! I think Brexit is potentially disastrous for the Arts and this country as a whole but, as with all things, we really need to fight hard to not let the disaster happen and keep forging ahead with new ideas and new work. It is up to us, the writers and the producers to write about what is happening now and to help people understand, throughout the country, and not just in London.*

*There are also many other factors which are currently influencing the fundraising landscape - local authority cuts, changes to ACE funding of museums, post-recession resurgence of corporate sponsorship etc. It's impossible to ignore these and just focus on the impact of Brexit.*

*I work with a lot of EU artists within Live Arts and Circus and feel that there is a worry about this going forward.*

*I would hope that the outcome will be positive and that there is a little more of an understanding at policy level of the impact of practical, hands-on creative organisations. It's all very well and good investing continually in organisations who review the outputs of creative practitioners and their impact of society, but eventually there will be no one left to review and very few left to pass on their skills, if funds are not channeled into practical, skilled based practitioners. I recently sat around a table with four other small arts companies, and their main topic of conversation was around filling out reporting documents for funders, who may not actually read and act upon the evidence submitted and not about creating good art and involving people. I have spent more time fire-fighting lack of funding and form filling than making art. Bureaucrats should be encouraged to support the creative offer, not subsume it - artists should be able to generate and advance our cultural offer not waste inordinate amounts of time form filling. A lightness of touch would be a sensible thing to adopt.*

*In the short term we don't think there will be major impact, but longer term once the Brexit process has been completed we do feel international partnerships and projects may be more challenging, time consuming and expensive.*

*It is a shame UK based organisations aren't able to apply to EU to get funding for international collaborations anymore. Even though we personally had not used that option yet, we were planning a large international touring exhibition which we no longer consider viable. Perhaps when the dust settles we will be able to reconsider this but my main worry is that for the next three to five years, there will be a lot of insecurity and probably a recession.*

*It is too early for us to say how much the result will affect us - our work is booked approximately 1 - 2 years in advance so we will not know the impact on future bookings until there has been time for repercussions to start coming down the chain to us.*

*It's already been a costly exercise and it's about to become more so - if 'other priorities' lead to further cuts in arts and cultural funding then it will inevitably have an impact.*

*It's difficult to judge where we'll be in a couple of years. At the moment Brexit is having little effect on us, but it's early days. If Brexit leads to the imposition of barriers that prevent the sector working with European colleagues that would be an enormous shame, both in terms of taking our work out of the UK, but also in our exposure to the work that is being made in mainland Europe. At this early stage the potential for an economic downturn and the possibility that we become a little more culturally isolated and inward looking is a very unpleasant idea.*

*London is a city of nations - where much of the world comes to meet Europe. The art, design and cultural industries have been a growing sector, and with London in particular seen as a global centre of excellence. A global capital, in fact. It would be a disaster for the UK economy if this city started to falter, and became a cultural backwater - a place so fond of its misunderstood past that it can't see the future, and the opportunities that can come about through collaboration. This is particularly so when it comes to the environment and relationships with close neighbours living on the same continent.*

*On our business level, it will probably prove a pain and annoyance, but ultimately we hope it won't actually change much. The biggest risk will be if there are major budget cuts to Arts Council or University funding, as we could be at risk from any downsizing/ cost cutting exercises.*

*One big risk is government and citizen distraction by Brexit and away from other important issues including arts/culture support/funding/distribution/participation/etc, migration, etc.*

*Pretty disastrous in terms of having an open cultural exchange and working with individual artists from the EU. but in the smaller world of a NE based dance company it is mainly in terms of employment bursaries from Universities. WE shall see!*

*Such a sad thing to happen - certainly will lead to many identity problems for individuals and businesses in the arts*

*The arts are scarcely affected by this so stop worrying and get on with something else.*

*The impact is going to be very significant. Our strength as an organisation comes in part from our European partnerships which will be damaged by Brexit.*

*The impact is structural and financial but it is also emotional. As that emotion subsides we need to work together with our European colleagues to maintain our connections, partnerships and more crucially our European identity. My work in the North East is intrinsically linked to other European Countries. I am a board member of the main Europe-wide cultural platform Culture Action Europe and a recent expert on the Commission's Voices of Culture panel on Intercultural Dialogue. I'm frequently called upon to add a British voice to European conversations seeking solutions for problems shared across our continent. Two days before the vote, my organisation, (respondent organization) was in the Slovenian capital Ljubljana for a partners' meeting with 20 or so cultural organisations and artists from Corners, a project supported by a major Creative Europe grant to bring together artists and communities on the edges of Europe. Our British artists with their fellow European colleagues move freely between countries without visas or work permits – they can spend a few days or more, earn a few euros and move on to the next project. They can choose to sell their work without punitive trade tariffs and benefit from joint planning and practice across borders. Together we have all built a complex, enquiring project built on trust, mutual risk and above all a generosity of spirit. It is vital that we not only consult our own communities to create art that speaks with/to/and for all of the UK, but that we consult our European and international partners to renegotiate and represent a confident position on the European (and wider world) stage.*

*The main "negative" at present is the high level of uncertainty which is leading to anxiety. The opportunity is that artists and creatives are now feeling that their voices and the opportunity for arts and culture to act as a unifying force across the UK is more urgent than ever. There is also some concern that the current government invests little in arts and culture already and values it even less in the currently political climate.*

*The main impact has been on morale, and ensuring that our EU artists feel welcome and not rejected by Brexit. The initial response was very concerning and we are at risk of alienating our international artists with this change.*

*There is so much uncertainty - it's possible to pontificate indefinitely (and many are!) but until we know what strategy/ies the British Govt is going to take, we are really sticking our fingers in the air!*

*There's little good we can see from Brexit from an arts perspective, save for a likely explosion of projects that try to address the root cultural causes of Brexit...though whether there'll be funding for them is another matter.*

*To me it is such a negative move, it goes against the premise of the Edinburgh International Festival which was set up over 70 years ago to celebrate internationalism. It goes against the very nature of what we do which is to help people to make sense of their place in the world. That also means looking out beyond your own culture and community to the wider world.*

*Too early to say*

*Until we know what the Arts funding implications of Brexit are, it's very difficult to guess the positive or negative impact.*

*We appear to have moved backward in our thinking back to some 30 years ago. We fear that our standing as leading world city will be adversely affected.*

*We have long looked across the channel to be inspired by an arts culture that is part of people's daily lives, and celebrated by everyone. I now fear that the dream of replicating that in this country has long gone, to be replaced by commercial models that have little regional identity or nuance. I feel that we live in an even more divided society than before, and whilst the arts are exactly the tool that could help to bridge that divide, we will not be given the chances to do so, as yet another economic downturn bites harder, we all know we will be first in the firing line for cuts. I despair for this small minded bigoted little country of ours- so much so that I am actively looking for other places to move to in the long term.*

*We have to be careful going forward that we do not cut ourselves off from vital networks abroad. The diversity and richness of the UK is founded on migration, to lose this would have devastating impacts on not only the creative industries, but society as a whole.*

*We should be fighting to prevent the country leaving the EU, not softening the blow of what will inevitably lead to another recession and the closure of many arts spaces, plus the loss of artists and art workers to other countries as they struggle further to make a living in the UK - as a direct result of Brexit.*

*We work in a sector that is massively international in its scope and appeal, and anything that puts up barriers between the communities involved in our artform, or simply makes it harder to exchange and promote work internationally, will have a detrimental effect.*

*Without a counter-acting drive towards a new internationalism, based on sweeping proposals for easing the movement of global artists through our industry and determined support to enable the UK cultural industries to think and act globally, rather than Euro-centrally, an era of tremendous growth, innovation and artistic freedom is over. As a life-long Londoner, and operator of the busiest theatre of its size in London, I am thinking of moving to Berlin. That should say it all.*

*Would that it were not so but ...*

*We are feeling lost. Despondent. Questioning our role. And finding it hard to do the amazing amount of work it takes -again - to dig ourselves out of this new hole.*

*We had radically altered everything about how the company works to keep going after the recession, changing from 10.5 employed staff to none. We are now all freelance (we get paid only for face to face arts work; all management work is done on a voluntary basis). There are no places left to cut.*

*We work stupidly hard to make things work. As so many artists do, we subsidise the work massively .... with money and time. And this is wimpy moaning on one level.*

*We are happy to find creative solutions and to make ourselves genuinely useful in wider societal terms. And if that use is not there then so be it.*

*It feels as if we have loads to contribute ...*

*But the conditions to make this possible just got a whole heap harder.*

## Respondent Profile

### Q. Which of the options below best describes your current role?

(Respondents: 408)

Independent/ Freelance Artist or Producer	9.7%
Artistic Director/ Curator	18.5%
Chief Executive	39.5%
Deputy Chief Executive	5.4%
General Manager	6.3%
Director/ Head of Finance	0.0%
Director/ Head of Marketing	1.5%
Director/ Head of Communications	2.0%
Director/ Head of Fundraising or Development	5.8%
Director/ Head of Commercial Development	0.5%
Finance Manager	0.0%
Communications/ Marketing Manager	2.5%
Fundraising/ Development Manager	6.3%
Freelance Consultant responding on behalf of an organisation	0.0%
Trustee/ Board Member or Senior Volunteer	2.0%

### Q. In which area or nation of the UK are you located?

(Respondents: 408)

England: London	41.0%
England: Midlands	12.3%
England: North	21.0%
England: South East/ East	12.3%
England: South West	10.3%
Northern Ireland	0%
Scotland	1.5%
Wales	0.5%
Outside of the UK	1.0%

### Q. Which of the following options best describes the main art form in which your organisation is engaged?

(Respondents: 408)

Combined Arts (incl. carnivals, festivals, contemporary performance, etc)	17.5%
Craft and Applied Arts	1.9%
Cross-Sector Service Provider	2.4%
Dance	11.7%
Digital Arts	1.4%
Film	0.5%
Literature	3.4%
Multi-Arts Form Venue	9.7%
Museum/ Heritage	1.9%
Music	8.7%
Opera	2.5%
Theatre/ Drama	23.9%
Visual Arts/ Gallery	14.6%

**Q. What is your current annual turnover?**

(Respondents: 408)

Under £250,000 a year	34.6%
Between £250,001 and £500,000 a year	18.0%
Between £500,001 and £1 million a year	17.5%
Over £1million a year but less than £5 million a year	19.1%
More than £5 million a year	9.2%
Don't know	1.4%

**Q. Does your organisation currently receive regular funding from your national Arts Council or equivalent body?**

(Respondents: 408)

Yes	66.3%
No	32.7%
Don't Know	1.0%

**Q. Does your organisation undertake any private sector fundraising (i.e. solicit support from companies, charitable trusts and/or individuals, etc)?**

(Respondents: 408)

Yes	90.9%
No	7.6%
Don't Know	1.5%

**Q. Does your organisation derive revenue from sources in the form of what is usually described as 'earned income' (i.e. admissions, touring activities, education programme fees, class or course fees, merchandise sales, etc)**

(Respondents: 408)

Yes	89.8%
No	9.2%
Don't Know	0.9%

## Report Author

### John Nicholls

John established Arts Quarter in January 2008 having worked in the arts and wider not-for-profit sectors since 1986 in a range of fundraising, communications and business development roles.

John has worked as a senior business development, communications and brand professional for a number of arts organisations in the UK and overseas including Shakespeare's Globe where he held the position of Director of Development. He has also worked for the Young Vic, English National Ballet, San Francisco Symphony and The Washington Ballet in similar roles. Outside of the cultural sector he has worked for Friends of the Earth, the Royal Institute of International Affairs and Stonewall, improving the effectiveness of communications and revenue generation activities - taking each of these organisations through significant processes of change to realize their ambitions. From 2004 – 2007, John served as MD of London Calling Arts, significantly increasing profitability of the agency during that period.

In addition to serving as Managing Partner of Arts Quarter, John is Chair of the Board of Greenwich Dance. In the past, he has served as a Trustee of South East Dance, National AIDS Trust, Trinity Laban Conservatoire of Music and Dance, Headlong Theatre and Pacitti Company.

John leads on Arts Quarter's research activities and has commissioned 16 research projects looking across developments across the sector since 2008. A full list of research projects can be found on the Arts Quarter website. The findings from these projects are published free of charge so that all working in the arts and cultural sectors can learn from what is happening across the UK arts community and build more resilient operating models.

Findings from these research projects also inform the ways in which Arts Quarter works with its clients across the arts ensuring that we remain at the forefront of innovations in the sector.

To find out more about Arts Quarter's research commissions and request copies of reports visit [www.artsquarter.co.uk/reports.html](http://www.artsquarter.co.uk/reports.html)

# *arts quarter*

---

Arts Quarter specialises in supporting the arts and wider creative sectors to deliver improved revenues, stronger brands, enhanced communications and effective staff and board structures.

Our independence, as a private sector agency, allows us to nurture new ways of thinking and challenge conventions within our client sectors, based on our direct expertise, wide knowledge base and networks.

We are committed to building resilient organisations where creativity can continue to prosper, thanks to the infrastructures developed to nurture it. Our approach is pragmatic and grounded, based on our knowledge and expertise in the field, developed over almost 30 years. From this, we create viable, tailored solutions that resonate with the expectations and values of our clients. We also know that simple language and effective communication during these processes of change gives the best results over the shortest time.

The diversity of our client base means that we are constantly stimulated and retain our passion and commitment for what we do. Our work across a range of communities also allows us to develop and share innovations from which we believe the arts can benefit.

Beyond our experience, our knowledge is founded on the input of the many hundreds of organisations who regularly take part in our research projects. Everyone benefits from this work as we are committed to providing unbiased and sometimes provocative reporting free-of-charge to stimulate debate and build capacity. Through this work, we are able to act as wholly independent and effective advocates and policy advisers for the arts community. We believe that our research work is important to us and valued by the sectors we support and serve.

Visit us at [www.artsquarter.co.uk](http://www.artsquarter.co.uk)

## Resilience

We strive to support arts organisations to enhance their resilience by offering a range of specialist services that seek to shift thinking and working practices in such a way that our clients are able to withstand the internal and external challenges that may come their way over the years ahead.

Creating and sustaining a culture of resilience can be highly demanding and will vary in its scale and intensity from one organisation to the next. We work sensitively with organisations and individual artists to create viable new models of working that will enable them to continue to realise their creative aspirations. We support the delivery and implementation of:

- considered strategic thinking and robust business planning,
- new ways of generating revenue and,
- stronger brands.

In other contexts, we are called on to nurture and support newly appointed and seasoned senior staff to develop their skills and practice with confidence, calling on our many years of working in the sector across all scales and regions of the UK.

Finally, finding the right people to work either in senior paid roles or as senior volunteers is perhaps all the more critical at this time when resources are increasingly tight. We seek out the right people and relish opportunities to place them within the arts.

## Innovation

Since our founding, we have developed a wide range of partnerships through which we offer services that will either increase revenues or generate cost savings to arts organisations. The premise behind us offering these services is that by doing so, we are able to support our clients to increase the levels of resources they are able to invest in creating great art.

Our current partnerships provide a broad range of services to the arts:

- Wealth Research
- Insurance Services
- Energy Audit

We nurture and test these partnerships over a significant period of time before bringing each one to market in order to understand fully the benefits that will be available to organisations of all scales and regions throughout the UK. We review each one regularly to ensure that it continues to offer good value and welcome receiving feedback from service users.

## Knowledge

As an independent agency working with and servicing the UK cultural sector, Arts Quarter has gained the nomenclature of the 'UK's leading cultural think-tank'.

Our research activities and the manner in which we report our findings aim to provide thought-leadership and exemplars of innovation to the arts community, at this time of profound change.

We also seek to provide a resource which arts professionals may use in order to benchmark the performance of their own organisations and as a basis for future organisational development.

Around 500 arts organisations now engage regularly with our research activities and we remain grateful for their interest in and support for this work from which the sector as a whole can derive benefit.

We strive to keep our research projects of relevance to the arts sector, seeking to understand and share information on issues likely to impact the community significantly so that our findings can be of as much benefit as possible to our participants and readers of our findings.

## Contact Details

John Nicholls  
Managing Partner  
Arts Quarter LLP  
2 Raynsford Road  
Northampton NN5 7HP

T: 01604 755760

[john@artsquarter.co.uk](mailto:john@artsquarter.co.uk)

*arts quarter*

