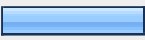
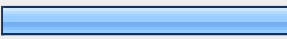
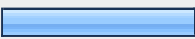

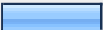
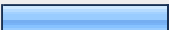
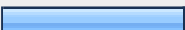
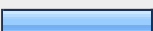







**1. You can choose to participate in this survey in one of three ways. IF YOU ARE THE LEADER OF AN ARTS ORGANISATION, please indicate this and you will be asked to give responses relating to that organisation. If you are not the leader, but are an INDIVIDUAL EARNING A LIVING IN OR FROM THE ARTS SECTOR, you will be asked to respond in a personal capacity, either as an EMPLOYEE or as a FREELANCE.**

	Response Percent	Response Count
answer as leader of an arts organisation 	22.8%	114
<b>answer as individual employed in the arts sector</b> 	<b>46.2%</b>	<b>231</b>
answer as individual working freelance in the arts sector 	31.0%	155
<i>answered question</i>		<b>500</b>
<i>skipped question</i>		<b>4</b>

**2. Overall, how confident are you in your organisation's ability to thrive over the next 12 months, compared to the previous 12 months?**

	Response Percent	Response Count
Much more confident 	4.6%	5
Slightly more confident 	15.6%	17
About the same 	26.6%	29
<b>Slightly less confident</b> 	<b>29.4%</b>	<b>32</b>
Much less confident 	23.9%	26
<i>answered question</i>		<b>109</b>
<i>skipped question</i>		<b>395</b>

### 3. How confident are you in your Board's ability to guide your organisation effectively over the next 12 months?

	Response Percent	Response Count
Very confident 	12.0%	13
<b>Quite confident</b> 	<b>50.0%</b>	<b>54</b>
Not very confident 	19.4%	21
Not confident at all 	8.3%	9
N/A 	10.2%	11
	<b><i>answered question</i></b>	<b>108</b>
	<b><i>skipped question</i></b>	<b>396</b>

#### 4. What impact do you think the following will have on your organisation's financial position over the next 12 months?

	Positive impact	No impact	Negative impact	Response Count
General levels of consumer confidence	20.8% (22)	37.7% (40)	<b>41.5% (44)</b>	106
Interest rates	1.9% (2)	<b>63.8% (67)</b>	34.3% (36)	105
Levels of corporate sponsorship	4.8% (5)	43.8% (46)	<b>51.4% (54)</b>	105
Levels of funding from Trusts and Foundations	15.4% (16)	26.0% (27)	<b>58.7% (61)</b>	104
Levels of government funding to the arts sector (through the arts funding bodies and local authorities)	6.7% (7)	11.5% (12)	<b>81.7% (85)</b>	104
European funding levels	8.7% (9)	<b>64.4% (67)</b>	26.9% (28)	104
Levels of government funding to the education sector	8.7% (9)	29.1% (30)	<b>62.1% (64)</b>	103
Levels of government funding to the health sector	1.9% (2)	<b>64.1% (66)</b>	34.0% (35)	103
Levels of government funding to support business and enterprise	15.7% (16)	<b>42.2% (43)</b>	<b>42.2% (43)</b>	102
Availability of credit from financial institutions	4.9% (5)	<b>82.5% (85)</b>	12.6% (13)	103
Other	10.3% (4)	<b>69.2% (27)</b>	20.5% (8)	39
			(please comment)	17
			<b>answered question</b>	<b>107</b>
			<b>skipped question</b>	<b>397</b>


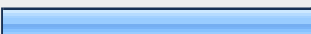
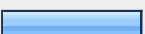


## 5. How likely is your organisation to take any of the following actions in the next 12 months?

	very unlikely	unlikely	neither likely nor unlikely	likely	very likely	n/a	Response Count
Recruit more staff	<b>32.4%</b> <b>(33)</b>	24.5% (25)	14.7% (15)	12.7% (13)	12.7% (13)	2.9% (3)	102
Make staff redundant	11.8% (12)	<b>27.5%</b> <b>(28)</b>	25.5% (26)	18.6% (19)	9.8% (10)	6.9% (7)	102
Impose a recruitment freeze	11.9% (12)	11.9% (12)	<b>23.8%</b> <b>(24)</b>	21.8% (22)	21.8% (22)	8.9% (9)	101
Use more freelancers	7.8% (8)	15.7% (16)	26.5% (27)	<b>30.4%</b> <b>(31)</b>	15.7% (16)	3.9% (4)	102
Use fewer freelancers	11.3% (11)	19.6% (19)	<b>39.2%</b> <b>(38)</b>	17.5% (17)	8.2% (8)	4.1% (4)	97
Impose a pay freeze	7.0% (7)	7.0% (7)	15.0% (15)	<b>37.0%</b> <b>(37)</b>	28.0% (28)	6.0% (6)	100
Negotiate reduced terms and conditions of employment for staff	6.9% (7)	<b>34.3%</b> <b>(35)</b>	23.5% (24)	15.7% (16)	12.7% (13)	6.9% (7)	102
Embark on a capital investment programme	<b>34.3%</b> <b>(35)</b>	17.6% (18)	8.8% (9)	17.6% (18)	8.8% (9)	12.7% (13)	102
Cancel planned capital investment	14.9% (15)	13.9% (14)	20.8% (21)	13.9% (14)	3.0% (3)	<b>33.7%</b> <b>(34)</b>	101
Share resources with other arts organisations	3.0% (3)	8.9% (9)	14.9% (15)	<b>42.6%</b> <b>(43)</b>	29.7% (30)	1.0% (1)	101
Close one or more departments or functions	13.7% (14)	<b>31.4%</b> <b>(32)</b>	18.6% (19)	16.7% (17)	12.7% (13)	6.9% (7)	102
Close down altogether or enter into administration / company voluntary arrangement	<b>41.2%</b> <b>(42)</b>	23.5% (24)	16.7% (17)	9.8% (10)	5.9% (6)	2.9% (3)	102
	<b>answered question</b>						<b>103</b>
	<b>skipped question</b>						<b>401</b>



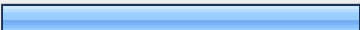

## 6. What is likely to happen to the following in your organisation over the next 12 months?

	significant increase	slight increase	stay the same	slight reduction	significant reduction	n/a	Response Count
Overall volume of artistic output	8.9% (9)	<b>28.7% (29)</b>	15.8% (16)	26.7% (27)	12.9% (13)	6.9% (7)	101
Amount of 'popular' work programmed	10.0% (10)	31.0% (31)	<b>34.0% (34)</b>	3.0% (3)	3.0% (3)	19.0% (19)	100
Amount of 'challenging' work programmed	2.9% (3)	11.8% (12)	<b>31.4% (32)</b>	24.5% (25)	12.7% (13)	16.7% (17)	102
Artistic collaborations with other arts organisations	22.0% (22)	<b>40.0% (40)</b>	20.0% (20)	6.0% (6)	1.0% (1)	11.0% (11)	100
Price levels	9.9% (10)	28.7% (29)	<b>44.6% (45)</b>	6.9% (7)	1.0% (1)	8.9% (9)	101
Amount of fundraising activity	<b>43.6% (44)</b>	27.7% (28)	17.8% (18)	2.0% (2)	4.0% (4)	5.0% (5)	101
Amount of marketing activity	32.7% (33)	<b>41.6% (42)</b>	19.8% (20)	2.0% (2)	3.0% (3)	1.0% (1)	101
<b>answered question</b>							<b>102</b>
<b>skipped question</b>							<b>402</b>

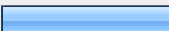
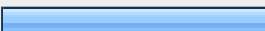
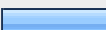


## 7. How confident are you that your current job is secure for at least the next 12 months?

	Response Percent	Response Count
Very confident 	12.1%	26
<b>Quite confident</b> 	<b>50.2%</b>	<b>108</b>
Not very confident 	22.3%	48
Not confident at all 	8.4%	18
I know my job will end 	7.0%	15
<b>answered question</b>		<b>215</b>
<b>skipped question</b>		<b>289</b>



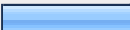



**8. How confident are you that you could secure a job in the arts sector within 6 months if your current job were to end?**

	Response Percent	Response Count
Very confident 	0.5%	1
Quite confident 	29.9%	64
<b>Not very confident</b> 	<b>57.9%</b>	<b>124</b>
Not confident at all 	11.7%	25
<i>answered question</i>		<b>214</b>
<i>skipped question</i>		<b>290</b>

**9. How confident are you in your senior management's ability to lead your organisation effectively over the next 12 months?**

	Response Percent	Response Count
Very confident 	27.2%	58
<b>Quite confident</b> 	<b>42.7%</b>	<b>91</b>
Not very confident 	16.4%	35
Not confident at all 	11.3%	24
No opinion 	2.3%	5
<i>answered question</i>		<b>213</b>
<i>skipped question</i>		<b>291</b>



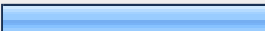
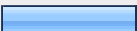
## 10. How confident are you in your Board's ability to guide your organisation effectively over the next 12 months?

	Response Percent	Response Count
Very confident 	15.8%	33
<b>Quite confident</b> 	<b>43.1%</b>	<b>90</b>
Not very confident 	20.6%	43
Not confident at all 	9.1%	19
No opinion 	7.2%	15
Don't know 	4.3%	9
<b>answered question</b>		<b>209</b>
<b>skipped question</b>		<b>295</b>

## 11. How acceptable would it be if your employer were to take the following actions in response to financial challenges?

	Unacceptable	Undesireable	Acceptable	Desirable	Response Count
Provide a below-inflation cost of living pay increment	8.6% (18)	38.1% (80)	<b>50.0% (105)</b>	3.3% (7)	210
Impose a pay freeze	7.5% (16)	42.0% (89)	<b>50.0% (106)</b>	0.5% (1)	212
Negotiate a reduction in pay	<b>55.0% (116)</b>	39.8% (84)	5.2% (11)	0.0% (0)	211
Negotiate a short-time working	28.0% (59)	<b>50.7% (107)</b>	20.9% (44)	0.5% (1)	211
<b>answered question</b>					<b>213</b>
<b>skipped question</b>					<b>291</b>

## 12. How confident are you that you will be able to sustain your current level of freelance earnings for the next 12 months?

	Response Percent	Response Count
Very confident 	4.4%	6
Quite confident 	31.6%	43
<b>Not very confident</b> 	<b>42.6%</b>	<b>58</b>
Not confident at all 	21.3%	29
<i>answered question</i>		<b>136</b>
<i>skipped question</i>		<b>368</b>

## 13. How likely are the following scenarios for your work over the next 12 months?

	Very unlikely	Unlikely	Neither likely nor unlikely	Likely	Very likely	Response Count
You increase your daily/hourly rate	31.3% (42)	<b>38.8% (52)</b>	15.7% (21)	10.4% (14)	3.7% (5)	134
You reduce your daily/hourly rate	11.5% (15)	25.4% (33)	25.4% (33)	<b>31.5% (41)</b>	6.2% (8)	130
You work for more clients	12.2% (16)	22.9% (30)	26.0% (34)	<b>33.6% (44)</b>	5.3% (7)	131
You work for fewer clients	7.0% (9)	29.5% (38)	<b>30.2% (39)</b>	24.0% (31)	9.3% (12)	129
You work for the same number of clients, but for more hours/days	8.0% (10)	20.8% (26)	<b>41.6% (52)</b>	24.8% (31)	4.8% (6)	125
You work for the same number of clients, but for fewer hours/days	8.9% (11)	19.4% (24)	<b>41.9% (52)</b>	27.4% (34)	2.4% (3)	124
<i>answered question</i>						<b>135</b>
<i>skipped question</i>						<b>369</b>